

**The Economic Impact
of Travel on
Tennessee Counties
2003**

A Study Prepared for the
Tennessee Department of Tourist Development
by the
Research Department of the
Travel Industry Association of America
Washington, D.C.
September 2004

PREFACE

This study was conducted by the Research Department of the Travel Industry Association of America (TIA) for the *Tennessee Department of Tourist Development*. The study provides 2002 and preliminary 2003 estimates of domestic and international travel-related expenditures in Tennessee, as well as the employment, payroll income, and federal, state and local tax revenue directly generated by these expenditures. Multiplier impact of these expenditures is also included.

Additionally, this study provides preliminary 2003 and revised 2002 domestic estimates by county for travel related expenditures, employment, payroll income and state and local tax revenue directly generated by these expenditures.

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EXECUTIVE SUMMARY

Total Impact of Travel

- Total domestic and international travel-related spending in Tennessee, including direct and indirect spending, reached \$16.9 billion in 2003, up 1.4 percent from 2002.
- Total employment in travel-related industries in Tennessee, both direct and indirect, reached 375.7 thousand jobs in 2003, up 0.1 percent from 2002.
- Total payroll income from travel-related employment was \$7.6 billion in 2003, up 1.1 percent from 2002.

Direct Impact of Domestic and International Travel

- Direct domestic and international travel spending reached more than \$10.8 billion in Tennessee during 2003, a 2.3 percent increase from 2002.
- Payroll generated by domestic and international travel spending reached nearly \$4.7 billion during 2003, up 2.3 percent from 2001.
- Employment generated by domestic and international travel spending accounted for 177.1 thousand jobs within Tennessee in 2003, 6.6 percent of the state's total non-agricultural employment.
- Tax revenues generated by domestic and international travel spending for federal, state, and local governments in 2003 totaled \$2.5 billion, a 0.8 percent increase from 2002.

Direct Impact of Domestic Travel

- In 2003, direct domestic travel spending in Tennessee was up 2.7 percent compared with 2002, to nearly \$10.6 billion.
- Payroll generated by domestic travel spending reached nearly \$4.6 billion, a 2.7 percent increase from 2002.
- Employment generated by domestic travel spending recovered 1.2 percent from 2002, to nearly 173.2 thousand jobs.
- Tax revenue generated by domestic travel spending for federal, state, and local governments totaled more than \$2.4 billion, up 1.3 percent from 2002.

INTRODUCTION

This report presents 2002 and preliminary 2003 estimates of the impact of U.S. resident and international traveler spending in Tennessee, as well as the employment, payroll income and tax revenue directly generated by this spending. These estimates are produced through the County/City Travel Economic Impact Model, a computerized economic model producing estimates of travel spending at the county level, and its impact on employment, wage and salary (payroll) income, and state and local tax revenues.

The County/City Travel Economic Impact Model is an extension of TIA's Travel Economic Impact Model (TEIM) initially developed in 1975 for the U.S. Department of the Interior to indicate the economic value of travel and tourism to states and counties. The original TEIM has been revised substantially based upon more accurate and targeted input data available from governments and the private sector.

The domestic component of TEIM is based upon national travel surveys conducted by TIA and other travel-related data developed by TIA, various federal agencies and national travel organizations each year. A description of the TEIM and the county impact model is provided in Appendix B. The following estimates of travel's economic impact on Tennessee are based upon the most recent version of the TEIM and data available from the U.S. Census Bureau and other sources, including international visitor statistics from OTTI/ITA, U.S. Department of Commerce.

U.S. residents traveling in Tennessee includes both state residents and out-of-state visitors traveling away from home overnight in paid accommodations, or on day trips to places 50 miles or more away from home. Travel commuting to and from work; travel by those operating an airplane, bus, truck, train or other form of common carrier transportation; military travel on active duty; and travel by students away at school are all excluded from the model. In addition, the payroll and employment estimates represent impact generated in the private sector and exclude public-supported payroll and employment.

The TravelScope Survey was modified in 2003 to capture more information. In doing so, more day trips were captured than in the past. Accordingly, previous travel volume figures were re-estimated to reflect the addition of more day trips. These changes are reflected in the estimates in this report.

Since additional data relating to travel and its economic impact in 2003 will become available subsequent to this study, TIA reserves the right to revise these estimates in the future.

2003 U.S. ECONOMY AND TRAVEL INDUSTRY OVERVIEW

The U.S. economy began to improve in 2003, in the wake of an economic recession and the 2001 terrorist attacks. Real GDP grew significantly in the third quarter, climbing 8.2 percent, the largest quarterly increase since first quarter 1984. Overall, this led real GDP to grow 3.1 percent for the year. Real disposable income grew 2.6 percent and real personal consumption expenditures were up 3.1 percent in 2003. The strengthening economy, however, failed to improve the U.S. employment situation in 2003. Although employment showed signs of recovery in November and December, the national unemployment rate hit 6.0 percent in 2003. The Consumer Confidence Index decreased to 79.8 (1985=100) from the 2002 level of 96.6. The Consumer Price Index (CPI), an indicator of the level of price inflation, remained relatively low—up 2.3 percent in 2003.

Helped by the recovery economy, domestic travel increased moderately in 2003. Domestic travel expenditures began to grow after declining in both 2001 and 2002. International travel to the U.S. continued to be depressed in 2003.

U.S. Travel Volume in 2003

Domestic travel volume grew moderately in 2003, driven mostly by leisure travel. Total domestic person-trips were up 1.2 percent over 2002, according to TIA's TravelScope® survey. Leisure person-trips grew by 1.9 percent in 2003. Following a change in travel preferences after 9/11, leisure travelers continued to report increased preferences for trips closer to home, using highways and going to rural destinations, rather than traveling to major cities and using air transportation. Business travel, however, continued to decline in 2003. In fact, a 2.9 percent drop in 2003 marked the fifth consecutive year of decline of business travel.

Security concerns, the war in Iraq, SARS and the uncertainty of the world economy prevented international inbound arrivals to the U.S. from growing in 2003. A total of 40.4 million international visitors came to the United States in 2003, down 3.7 percent from 2002.

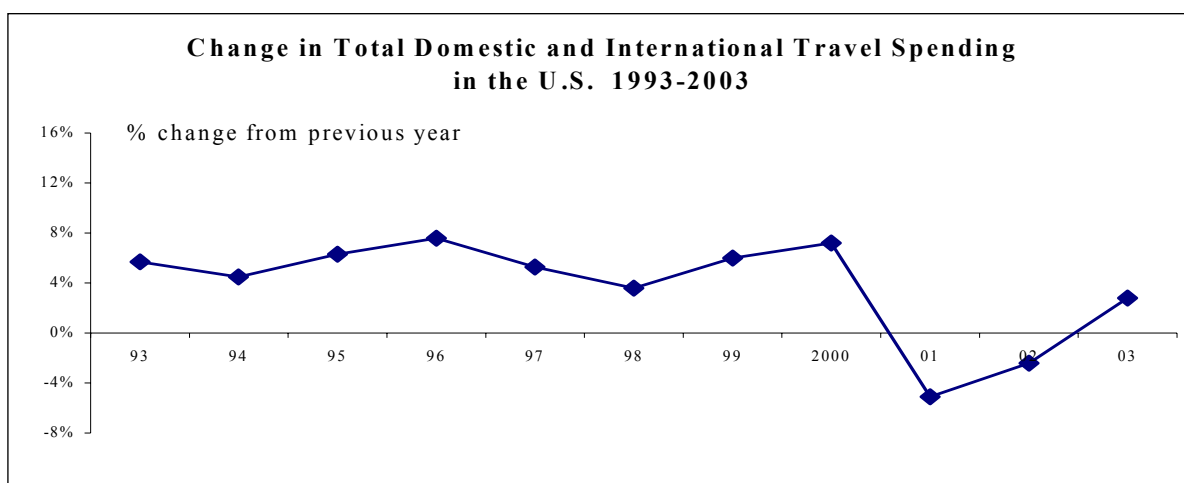
Travel Expenditures in 2003

Domestic and international travelers spent a total of \$552.1 billion in the U.S. during 2003, up 2.7 percent from 2002. This upswing in 2003, however, was driven exclusively by domestic travel.

Domestic travel expenditures in the U.S. grew in 2003 after two consecutive years of decline. Domestic travelers spent \$490 billion in the U.S. during their 2003 travels, an increase of 3.5 percent from 2002. International travel spending in the U.S., however, fell 3.0 percent in 2003 after undergoing a 7.4 percent decline in 2002. International travelers spent \$62.1 billion in the U.S. during 2003 (excluding international passenger fare payments, international traveler spending in the U.S. territories, and Canadian traveler spending not allocated to states.).

Leisure travel played a significant part in the growth of domestic travel spending. Domestic leisure travelers spent \$336.8 billion in 2003, up 5.1 percent from 2002. Spending by domestic

business travelers remained unaltered in 2003. As a result, the market shares of business travel spending declined by 3.2 percent compared to 2002.



Source: TIA, OTTI

Table 1: 2002-03 U.S. Domestic Travel Expenditures by Primary Purpose of Trip

	2003 U.S. Domestic Travel Spending (\$ Billions)	2002 U.S. Domestic Travel Spending (\$ Billions)	2003 Percent Change Over 2002 (%)
Leisure Travelers	\$336.8	\$320.6	5.1%
Business Travelers	\$153.2	\$153.0	0.1%
Total	\$490.0	\$473.6	3.5%

Source: TIA

Travel spending on auto transportation jumped 10.1 percent from 2002, to \$83.6 billion. This was mainly due to a dramatic increase in gasoline prices during 2003 and the increase in auto travel volume.

Air travel continued to decline in 2003. According to the Air Transport Association (ATA), total domestic passenger enplanements were down 2.8 percent from 2002 and international passengers decreased by 1.8 percent in 2003. Airline revenue in 2003 dropped 3.6 percent from 2002.

Domestic travel spending on lodging increased 2.3 percent over 2002. Hotel room demand (hotel room nights sold) grew 1.6 percent and room supply rose 1.2 percent in 2003, according to Smith Travel Research. Reflecting the increase in total travel volume, spending on food services and other categories also showed positive growth in 2003.

Table 2: Travel Expenditures in the U.S. 2002-2003

<u>Industry Sector</u>	2003 Travel Spending in The U.S. (\$ Billions)	2002 Travel Spending in The U.S. (\$ Billions)	2003 Percent Change Over 2002 (%)
Public Transportation	\$94.5	\$93.8	0.7%
Auto Transportation	83.6	75.9	10.1%
Lodging	87.8	85.8	2.3%
Foodservice	122.9	119.3	3.0%
Entertainment	60.2	58.1	3.5%
General Retail	41.0	40.6	1.2%
Domestic Total	\$490.0	\$473.6	3.5%
International Total*	\$62.1	\$64.0	-3.0%
Total	\$552.1	\$537.6	2.7%

Source: TIA

* Total international traveler spending does not include international passenger fare payments, international traveler spending in the U.S. territories, and Canadian traveler spending not allocated to states.

Travel Employment in 2003

The upturned U.S. economy did not lead private industry to hire more workers. Employment in the private sector continued to decline in 2003 after a 1.6 percent decrease in 2002. The national unemployment rate hit 6.0 percent in 2003, according to the Bureau of Labor Statistics (BLS). The employment situation in the travel industry was worse than other industries. Compared to a 0.4 percent decline in all private employment, total travel-generated employment in the U.S. declined 2.0 percent in 2003.

Travel-generated employment in the public transportation sector (composed mainly of the airline industry) declined by 6.5 percent in 2003, the most severe decrease among all travel industry sectors. Employment in travel planning (i.e., the travel agent and travel arrangement industry) continued to decline as well, down 4.9 percent from 2002. In addition, lodging industry employment decreased 1.2 percent.

On the other hand, employment in the entertainment (i.e., amusement/recreation) sector increased 3.4 percent in 2003, after widespread downsizing in 2002.

Table 3: Travel-Generated Employment in the U.S., 2002-2003

<u>Industry Sector</u>	<u>2003 Travel-Generated Employment (Thousands)</u>	<u>2002 Travel-Generated Employment (Thousands)</u>	<u>2003 Percent Change Over 2002 (%)</u>
Public Transportation	945.6	1,011.3	-6.5%
Auto Transportation	253.6	257.1	-1.3%
Lodging	1,178.4	1,192.6	-1.2%
Foodservice	2,407.6	2,433.3	-1.1%
Entertainment	1,093.8	1,058.2	3.4%
General Retail	341.0	347.2	-1.8%
Travel Planning	178.4	187.5	-4.9%
Domestic Travelers	6,398.4	6,487.3	-1.4%
International Travelers*	822.1	878.9	-6.5%
Total	7,220.5	7,366.2	-2.0%

Sources: TIA, BLS

* Excludes jobs generated by international passenger fare payments, international traveler spending in the U.S. territories, and Canadian traveler spending not allocated to states.

Table 4: Overall U.S. Economic Developments, 2001-2003

<u>Sector</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
Nominal gross domestic product (\$ billions)	\$10,100.8	\$10,480.8	\$10,987.9
Real gross domestic product (\$ billions)*	\$9,866.6	\$10,083.0	\$10,398.0
Total retail sales (\$ billions)	\$3,156.8	\$3,230.1	\$3,399.5
Real disposable personal income (\$ billions)*	\$7,320.2	\$7,596.7	\$7,797.8
Real personal consumption expenditures (\$ billions)*	\$6,904.6	\$7,140.4	\$7,365.2
Consumer price index**	177.1	179.9	184.0
Travel Price Index**	196.9	196.3	201.1
Non-farm payroll employment (millions)	131.8	130.3	129.9
Unemployment rate (%)	4.7	5.8	6.0

Percentage change from previous year

Nominal gross domestic product	2.9%	3.8%	4.8%
Real gross domestic product	0.5%	2.2%	3.1%
Total retail sales	2.8%	2.3%	5.2%
Real disposable personal income	1.8%	3.8%	2.6%
Real personal consumption expenditures	2.5%	3.4%	3.1%
Consumer price index	2.8%	1.6%	2.3%
Travel Price Index	1.1%	-0.3%	2.4%
Non-farm payroll employment	0.0%	-1.1%	-0.3%

Sources: U.S. Dept. of Commerce, U.S. Dept. of Labor, U.S. Census Bureau, TIA

* Chained 2000 dollars

** Base period: 1982-84=100

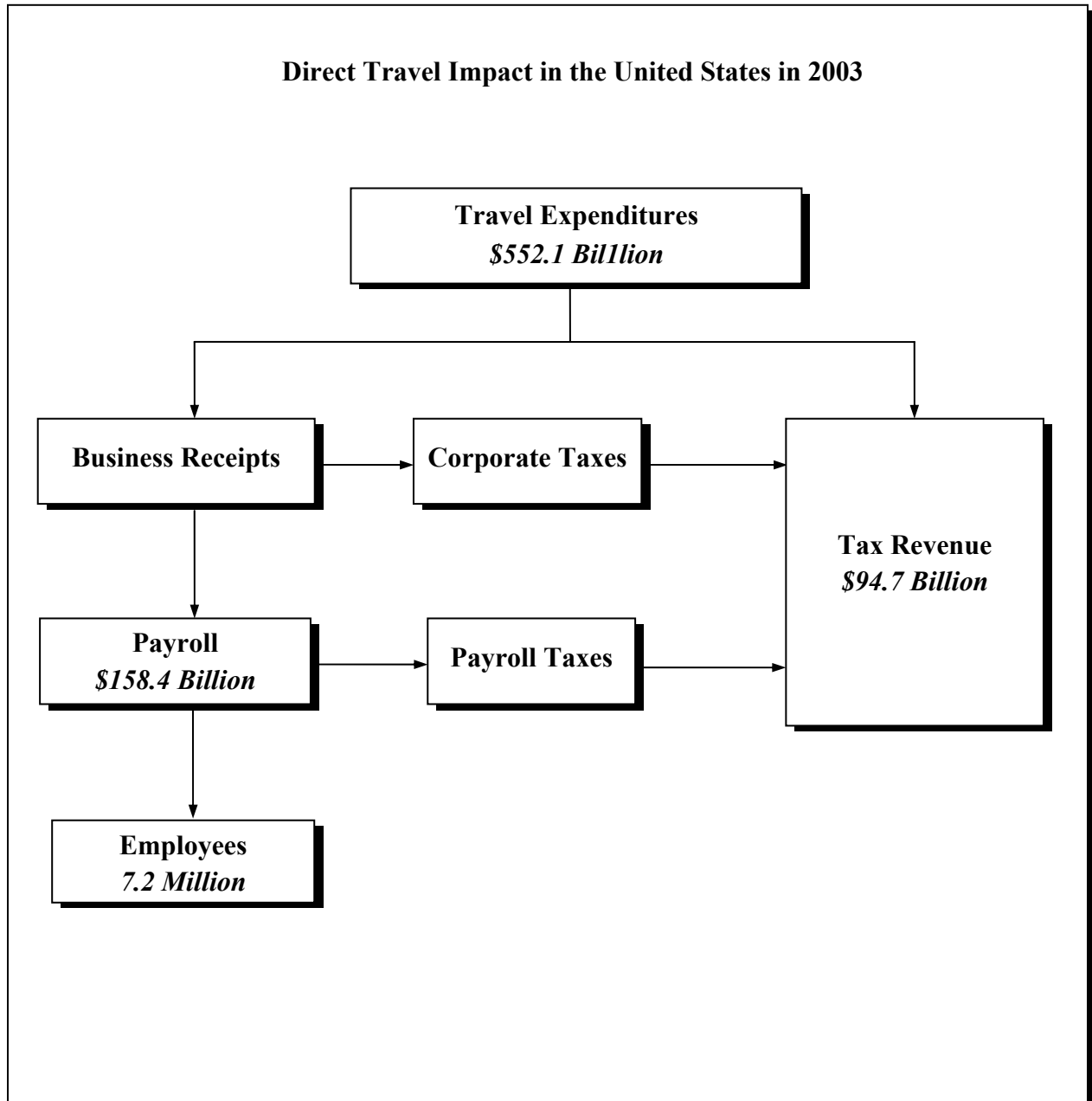
Table 5: U.S. Travel Trends, 1999-2003

<u>Category</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
Total U.S. resident person-trips (millions)	1,089.5	1,100.8	1,123.1	1,127.0	1,140.0
Total international visitors (millions)	48.5	50.9	44.9	41.9	40.4
U.S. travel expenditures (\$ billions)	\$467.3	\$498.6	\$479.0	\$473.6	\$490.0
International travel expenditures in the U.S. * (\$ billions)	\$71.9	\$79.3	\$69.2	\$64.0	\$62.1
Travel price index	183.6	194.8	196.9	196.3	201.1
Travel-generated employment** (thousands)	7,485	7,701	7,595	7,366	7,221
<i>Percentage change from previous year</i>					
Total U.S. resident person-trips	-1.7%	1.0%	2.0%	0.4%	1.2%
Total international visitors	4.5%	5.1%	-11.9%	-6.7%	-3.7%
U.S. travel expenditures	6.2%	6.7%	-3.9%	-1.1%	3.5%
International travel expenditures in the U.S. *	4.9%	10.2%	-12.8%	-7.4%	-3.0%
Travel price index	3.7%	6.1%	1.1%	-0.3%	2.4%
Travel-generated employment**	2.7%	2.9%	-1.4%	-3.0%	-2.0%

Sources: TIA, Office of Travel and Tourism Industries (OTTI)/International Trade Administration, BLS, BEA

Note: * Total international traveler spending does not include international passenger fare payments, international traveler spending in the U.S. territories, and Canadian traveler spending not allocated to states.

** Includes employment generated by both domestic and international traveler expenditures.



Source: TIA

TRAVEL IMPACT ON TENNESSEE – 2003

Travel Expenditures

Travel spending in Tennessee by both domestic and international travelers reached more than \$10.8 billion during 2003, up 2.3 percent from 2002. Domestic travel spending comprised 97.5 percent of total state travel expenditures in 2003.

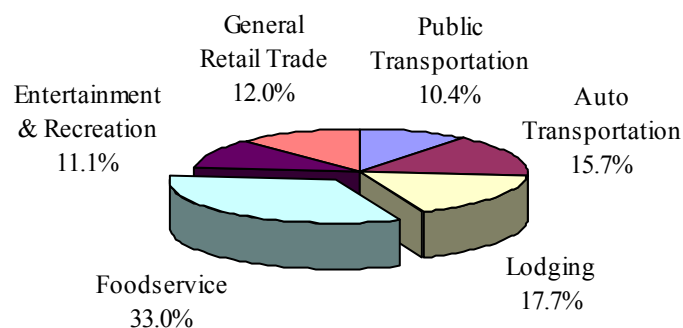
Foodservice was the largest domestic travel expenditure category in 2003, totaling nearly \$3.5 billion, almost one-third (33.0%) of the state total. This sector rose 4.0 percent from 2002, the largest increase among the six categories investigated in this report.

Traveler spending on lodging ranked second with nearly \$1.9 billion in 2003, 17.7 percent of the state total.

Air travel continued to decline in Tennessee in 2003. Domestic travelers spent more than \$1.1 billion on public transportation, a decrease of 7.3 percent from 2002.

International travelers' spending in Tennessee was down 13.2 percent from 2002 due to a continued significant drop in international travelers to Tennessee.

**Direct Domestic Travel Expenditures in Tennessee
by Industry Sector, 2003**



-
1. Foodservice sector includes restaurants, grocery stores and other eating and drinking establishments.
 2. Lodging sector consists of hotels and motels, campgrounds, and ownership or rental of vacation or second homes.
 3. Public transportation sector comprises air, intercity bus, rail, boat or ship, and taxicab or limousine service.
 4. Auto transportation sector includes privately-owned vehicles that are used for trips (e.g., automobiles, trucks, campers or other recreational vehicles), gasoline stations, and automotive rental.
 5. General retail trade sector includes gifts, clothes, souvenirs, and other incidental retail purchases.
 6. Entertainment and recreation sector includes such items as golf, skiing and gaming.
-

Table 6: Direct Travel Expenditures in Tennessee by Industry Sector, 2002-2003**2003 Expenditures**

	<u>Domestic (\$ millions)</u>	<u>% of Domestic Total</u>
Public Transportation	\$1,103.5	10.4%
Auto Transportation	1,666.2	15.7%
Lodging	1,873.2	17.7%
Foodservice	3,490.1	33.0%
Entertainment & Recreation	1,175.1	11.1%
General Retail Trade	1,271.7	12.0%

Domestic Total	\$10,579.8	100.0%
International Total	270.0	
Grand Total *	\$10,849.8	

2002 Expenditures

Public Transportation	\$1,190.8	11.6%
Auto Transportation	1,532.6	14.9%
Lodging	1,823.2	17.7%
Foodservice	3,355.8	32.6%
Entertainment & Recreation	1,146.9	11.1%
General Retail Trade	1,248.5	12.1%

Domestic Total	\$10,298.0	100.0%
International Total	311.1	
Grand Total *	\$10,609.0	

**Percentage Change
2003 over 2002**

Public Transportation	-7.3%
Auto Transportation	8.7%
Lodging	2.7%
Foodservice	4.0%
Entertainment & Recreation	2.5%
General Retail Trade	1.9%

Domestic Total	2.7%
International Total	-13.2%
Grand Total *	2.3%

Sources: TIA, OTTI/ITA

Note: * Total domestic expenditures and percent change from previous year may not match those in county tables due to rounding.

TRAVEL IMPACT ON TENNESSEE – 2003

Travel Expenditure Trends

During 2003, spending by domestic and international travelers in Tennessee was more than \$10.8 billion, 2.3 percent of total travel expenditures in the U.S.

Domestic travel expenditures in Tennessee showed steady growth from 1996 to 2000. The 9/11 terrorist attacks severely hampered the U.S. travel and tourism industry. Domestic traveler spending in the U.S. declined 3.9 percent in 2001. The growth of domestic travel spending in Tennessee was also halted in 2001, but it was much less affected than most other states in the U.S. Domestic travel spending in Tennessee experienced continued recovery in 2002 and 2003, up, respectively, 1.7 percent and 2.7 percent.

On the other hand, after a sharp increase during 2000, international traveler spending in Tennessee declined consecutively for three years from 2001 to 2003, at a rate of more than ten percent.

Table 7: Travel Expenditure Trends in Tennessee, 1996-2003

Year	Domestic Travel Spending		Market Share (%)	Percent Change From Previous Year	
	Tennessee (\$ Billions)	U.S. (\$ Billions)		Tennessee (%)	U.S. (%)
2003	\$10.6	\$490.0	2.16%	2.7%	3.5%
2002	\$10.3	\$473.6	2.17%	1.7%	-1.1%
2001	\$10.1	\$479.0	2.11%	0.0%	-3.9%
2000	\$10.1	\$498.6	2.03%	5.5%	6.7%
1999	\$9.6	\$467.3	2.05%	5.0%	6.2%
1998	\$9.1	\$440.0	2.08%	3.8%	4.8%
1997	\$8.8	\$419.9	2.10%	5.9%	5.3%
1996	\$8.3	\$398.7	2.09%	5.6%	7.2%

Year	International Travel Spending		Market Share (%)	Percent Change From Previous Year	
	Tennessee (\$ Millions)	U.S. (\$ Millions)		Tennessee (%)	U.S. (%)
2003	\$270	\$62,100	0.43%	-13.2%	-3.0%
2002	\$311	\$64,000	0.49%	-18.4%	-6.2%
2001	\$381	\$68,200	0.56%	-13.8%	-14.0%
2000	\$442	\$79,300	0.56%	30.8%	10.1%
1999	\$338	\$72,000	0.47%	-1.2%	5.0%
1998	\$342	\$68,600	0.50%	-4.6%	-2.8%
1997	\$359	\$70,600	0.51%	8.7%	5.1%
1996	\$330	\$67,200	0.49%	2.3%	10.2%

Year	Total Travel Spending		Market Share (%)	Percent Change From Previous Year	
	Tennessee (\$ Billions)	U.S. (\$ Billions)		Tennessee (%)	U.S. (%)
2003	\$10.8	\$552.1	1.97%	2.3%	2.7%
2002	\$10.6	\$537.6	1.97%	1.0%	-1.8%
2001	\$10.5	\$547.2	1.92%	-0.6%	-5.3%
2000	\$10.6	\$577.9	1.83%	6.4%	7.1%
1999	\$9.9	\$539.3	1.84%	4.8%	6.0%
1998	\$9.5	\$508.6	1.86%	3.5%	3.7%
1997	\$9.2	\$490.5	1.87%	6.0%	5.3%
1996	\$8.6	\$465.9	1.86%	5.5%	7.6%

Sources: TIA, OTTI/ITA

TRAVEL IMPACT ON TENNESSEE – 2003

Tennessee Ranking * – Domestic Travel Expenditures

- In 2002, Tennessee ranked 14th in domestic travel spending among all 50 states and the District of Columbia.
- Among the ten states comprising the Discover America Travel Region of the South, Tennessee ranked 4th in domestic travel spending in 2002.
- Tennessee's market share of domestic travel expenditures in the South region was 9.1 percent in 2002, a slight increase from 2001.

Table 8: Share of Domestic Travel Expenditures in the South Region by State, 2002

State	Rank	Domestic Expenditures (\$ Billions)	Percent of South Region Total
Florida	1	\$40.6	36.0%
Georgia	2	14.1	12.5%
North Carolina	3	12.5	11.0%
Tennessee	4	10.3	9.1%
Louisiana	5	8.8	7.8%
South Carolina	6	7.0	6.2%
Alabama	7	5.3	4.7%
Mississippi	8	5.3	4.7%
Kentucky	9	5.2	4.6%
Arkansas	10	3.9	3.4%
South Region Total		\$113.0	100.0%

Source: TIA

* Based on 2002 ranking, the latest available at this time.

Table 9: Ranking of the Top 20 U.S. States in 2002 by Domestic Travel Expenditures

State	Expenditures (\$ Billions)	Share of U.S. Total	Rank
California	\$58.0	12.3%	1
Florida	40.6	8.6%	2
Texas	31.2	6.6%	3
New York	26.9	5.7%	4
Illinois	20.7	4.4%	5
Nevada	18.3	3.9%	6
Pennsylvania	14.7	3.1%	7
New Jersey	14.4	3.0%	8
Georgia	14.1	3.0%	9
Virginia	13.3	2.8%	10
North Carolina	12.5	2.6%	11
Ohio	12.2	2.6%	12
Michigan	11.6	2.5%	13
Tennessee	10.3	2.2%	14
Massachusetts	9.8	2.1%	15
Missouri	9.3	2.0%	16
Colorado	8.9	1.9%	17
Louisiana	8.8	1.9%	18
Maryland	8.7	1.8%	19
Arizona	8.5	1.8%	20
Top 20 State Total	\$352.8	74.5%	
U.S. Total	\$473.6	100.0%	

Source: TIA

* Based on 2002 ranking, the latest available at this time.

TRAVEL IMPACT ON TENNESSEE – 2003

Travel-Generated Payroll

Travel-generated payroll is the wage and salary income paid to employees directly serving travelers within the industry sectors from which they purchase goods and services. Each dollar spent on travel generates different amounts of payroll income within the various travel industry sectors depending on the labor content and the wage structure of each sector.

Payroll (wages and salaries) paid by Tennessee travel-related firms and directly attributable to domestic and international travel spending reached nearly \$4.7 billion in 2003, up 2.3 percent from 2002. This increase, however, was exclusively driven by domestic consumer spending.

The public transportation sector, including air couriers, posted the largest payroll generated by domestic travel spending in 2003, at more than \$2.5 billion, up 2.7 percent from 2002.

Payroll generated by domestic travel spending in the foodservice industry reached \$842 million, up 3.2 percent from 2002.

**Domestic Travel-Generated Payroll in Tennessee
by Industry Sector, 2003**

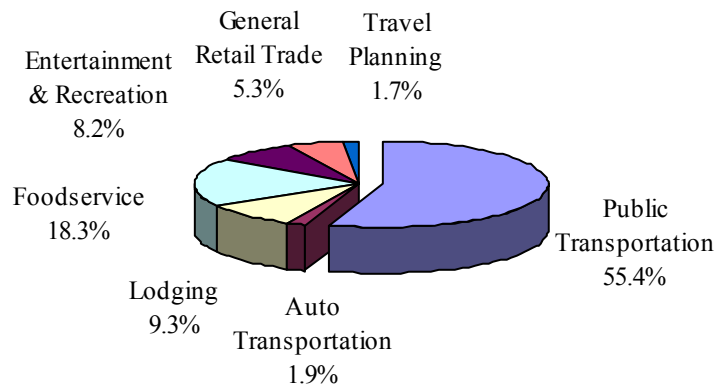


Table 10: Travel-Generated Payroll in Tennessee by Industry Sector, 2002-2003

<i>2003 Payroll</i>	<u>Domestic (\$ millions)</u>	<u>% of Domestic Total</u>
Public Transportation	\$2,541.8	55.4%
Auto Transportation	86.7	1.9%
Lodging	427.0	9.3%
Foodservice	842.2	18.3%
Entertainment & Recreation	375.6	8.2%
General Retail Trade	241.3	5.3%
Travel Planning *	76.2	1.7%
Domestic Total	\$4,590.9	100.0%
International Total	77.2	
Grand Total **	\$4,668.0	
<i>2002 Payroll</i>		
Public Transportation	\$2,474.2	55.3%
Auto Transportation	85.5	1.9%
Lodging	416.6	9.3%
Foodservice	815.9	18.2%
Entertainment & Recreation	366.5	8.2%
General Retail Trade	237.2	5.3%
Travel Planning *	76.1	1.7%
Domestic Total	\$4,472.0	100.0%
International Total	89.9	
Grand Total **	\$4,561.9	
<i>Percentage Change, 2003 over 2002</i>		
Public Transportation	2.7%	
Auto Transportation	1.4%	
Lodging	2.5%	
Foodservice	3.2%	
Entertainment & Recreation	2.5%	
General Retail Trade	1.7%	
Travel Planning *	0.1%	
Domestic Total	2.7%	
International Total	-14.2%	
Grand Total **	2.3%	

Sources: TIA, OTTI/ITA

Notes: * Refers to payroll income that goes to travel agents, tour operators, and other travel service employees who arrange passenger transportation, lodging, tours and other related services. ** Total domestic payroll and percent change from previous year may not match those in county tables due to rounding.

TRAVEL IMPACT ON TENNESSEE – 2003

Travel-Generated Employment

Perhaps the most impressive contribution of travel and tourism to the Tennessee economy is the number of businesses and jobs it supports. Due to the diversity of the travel industry in Tennessee, a wide variety of multi-level jobs are supported. These jobs include a large number of executive and managerial positions, as well as service-oriented occupations.

During 2003, 177.1 thousand domestic and international travel-related jobs were generated, including full-time and seasonal/part-time positions in the state. Driven exclusively by domestic travel, travel-related employment in Tennessee increased 0.7 percent from 2002.

The 177.1 thousand travel-related jobs comprised 6.6 percent of total non-agricultural employment in Tennessee in 2003. Without these jobs generated by travel, Tennessee's 2003 unemployment rate of 5.8 percent would have been 6.1 percentage points higher than it was, or 11.9 percent of the labor force.

Domestic travel spending in the foodservice sector generated more jobs than any other industry sector, accounting for 64.3 thousand jobs, and 37.7 percent of the state total. Faster growth in travelers' spending on this category increased this sector's employment 1.6 percent from 2002.

**Domestic Travel-Generated Employment
in Tennessee by Industry Sector, 2002**

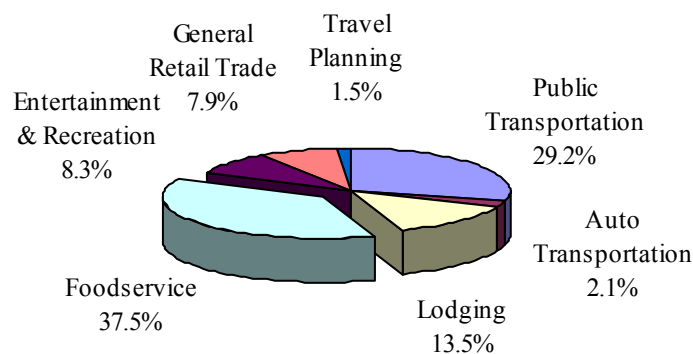


Table 11 Travel-Generated Employment in Tennessee by Industry Sector, 2002-2003

<i>2003 Employment</i>	<u>Domestic (Thousands)</u>	<u>% of Domestic Total</u>
Public Transportation	50.9	29.4%
Auto Transportation	3.5	2.0%
Lodging	23.0	13.3%
Foodservice	65.3	37.7%
Entertainment & Recreation	14.7	8.5%
General Retail Trade	13.4	7.8%
Travel Planning *	2.4	1.4%
Domestic Total	173.2	
International Total	3.9	
Grand Total **	177.1	100.0%
<i>2002 Employment</i>		
Public Transportation	50.0	29.2%
Auto Transportation	3.5	2.1%
Lodging	23.1	13.5%
Foodservice	64.2	37.5%
Entertainment & Recreation	14.2	8.3%
General Retail Trade	13.5	7.9%
Travel Planning *	2.5	1.5%
Domestic Total	171.2	
International Total	4.6	
Grand Total **	175.8	100.0%
<i>Percentage Change, 2003 over 2002</i>		
Public Transportation	1.7%	
Auto Transportation	-0.2%	
Lodging	-0.2%	
Foodservice	1.6%	
Entertainment & Recreation	3.0%	
General Retail Trade	-0.7%	
Travel Planning *	-4.9%	
Domestic Total	1.2%	
International Total	-15.2%	
Grand Total **	0.7%	

Sources: TIA, OTTI/ITA

Notes: *Refers to jobs created in travel arrangement firms such as travel agencies, wholesale and retail tour companies, and other travel-related service businesses. ** Total domestic employment and percent change from previous year may not match those in county tables due to rounding.

TRAVEL IMPACT ON TENNESSEE – 2003

Travel-Generated Tax Revenue

Travel tax receipts includes the federal, state, and local tax revenue attributable to travel spending in Tennessee. Travel-related tax revenue is a significant economic benefit, as governments use these funds to support the travel infrastructure and help support a variety of public programs.

Travel-related spending by both domestic and international travelers in Tennessee generated \$2.5 billion for the federal, state and local governments during 2003, up 0.8 percent from 2002.

Domestic travel-related and income tax revenue for the federal government was nearly \$1.6 billion in 2003. This represents 63.8 percent of all domestic travel-related tax collections in the state.

Domestic travel spending in Tennessee also generated nearly \$567 million in tax revenue for the state treasury through state sales and excise taxes, and taxes on personal and corporate income. This comprised 23.2 percent of all domestic travel-generated tax revenue for 2003 collected in the state.

Tennessee localities directly benefited from travel as well. During 2003, domestic travel spending generated nearly \$319 million in sales and property tax revenue for local governments, 13.0 percent of total domestic travel-generated tax revenue in the state. Each domestic travel dollar produced 3 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue in
Tennessee by Level of Government, 2003**

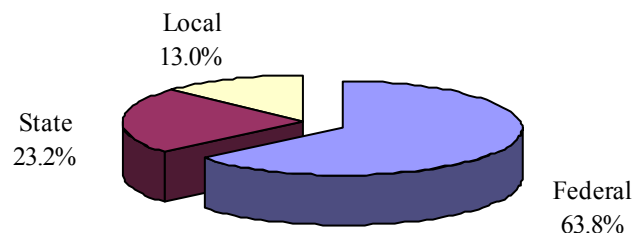


Table 12: Travel-Generated Tax Revenue in Tennessee by Level of Government, 2002-2003

<i>2003 Tax Revenue</i>	<u>Domestic (\$ millions)</u>	<u>% of Domestic Total</u>
Federal	\$1,557.6	63.8%
State	566.6	23.2%
Local	318.5	13.0%
Domestic Total	\$2,442.7	100.0%
International Total	58.8	
Grand Total	\$2,501.5	
<i>2002 Tax Revenue</i>		
Federal	\$1,551.1	64.3%
State	552.2	22.9%
Local	308.9	12.8%
Domestic Total	\$2,412.2	100.0%
International Total	68.7	
Grand Total	\$2,480.9	
<i>Percentage Change, 2003 over 2002</i>		
Federal	0.4%	
State	2.6%	
Local	3.1%	
Domestic Total	1.3%	
International Total	-14.4%	
Grand Total	0.8%	

Sources: TIA, OTTI/ITA

MULTIPLIER IMPACT OF TRAVEL SPENDING IN TENNESSEE

Travelers in Tennessee produce “secondary” impacts over and above that of their original expenditures previously detailed. These secondary outputs (sales) and earnings (wage and salary income) arise from “indirect” and “induced” spending.

Indirect impact occurs as travel industry business operators, such as restaurants, purchase goods, such as food and beverages, and services, such as electricity and building maintenance, from local suppliers. These purchases generate additional output or sales indirectly.

Induced impact occurs as a result of the employees of businesses, and their suppliers, spending part of their earnings in the area. This spending itself generates sales additional to the indirect impact.

The sum of the indirect and induced effects comprises the total secondary impact of traveler expenditures in the area. The ratio of the sum of primary output generated (travel spending) plus secondary output to initial expenditures alone is commonly termed the sales or output “multiplier”.

During the secondary impact process, wage and salary income (earnings) are generated in addition to that produced by the initial travel expenditures as the suppliers employ labor to produce the additional output. The “earnings multiplier” is the ratio of the total primary and secondary earnings generated by the initial travel spending to that spending. Just as additional earnings are created, employment is also generated during the secondary impact process. The “employment multiplier” represents the number of jobs provided, directly and indirectly, for each one million dollars of output or expenditures generated.

Table 13 summarizes the direct, indirect and induced, and total impacts of travel spending on the Tennessee economy during 2002 and 2003.

In 2003, the \$10.8 billion spent directly by domestic and international travelers in Tennessee generated total output value of \$16.9 billion, up 1.4 percent from 2002. The ratio of total output to the initial spending is 1.57, the output multiplier. This indicates that the average travel dollar generated an additional 57 cents in secondary sales for a total impact of \$1.57.

In 2003, nearly \$4.7 billion was paid to 177.1 thousand employees in travel-related industries. In addition, domestic and international travelers’ spending in Tennessee generated more than \$2.9 billion in payroll income and 198.6 thousand jobs through secondary impacts (indirect and induced impact) during 2003.

Table 13: Multiplier Impact of Travel Spending in Tennessee, 2002-2003

2003 Multiplier Impact

<u>Impact Measure</u>	<u>Direct Impact</u>	<u>Indirect & Induced Impact</u>	<u>Total Impact</u>
Expenditures (\$ millions)	\$10,849.8	\$6,057.8	\$16,907.6
Earnings (\$ millions)	\$4,668.0	\$2,945.1	\$7,613.1
Employment (thousands)	177.1	198.6	375.7

2002 Multiplier Impact

Expenditures (\$ millions)	\$10,609.0	\$6,065.2	\$16,674.2
Earnings (\$ millions)	\$4,561.9	\$2,968.4	\$7,530.3
Employment (thousands)	175.8	199.5	375.3

***Percent Change
2003 over 2002***

Expenditures	2.3%	-0.1%	1.4%
Earnings	2.3%	-0.8%	1.1%
Employment	0.7%	-0.5%	0.1%

Sources: U.S. Department of Commerce, Bureau of Economic Analysis, RIMS II; TIA

2003 DOMESTIC TRAVEL IMPACT ON TENNESSEE COUNTIES

During 2003, domestic travelers spent nearly \$10.6 billion while traveling in Tennessee, up 2.7 percent from 2002. Travel-related industries in Tennessee received nearly \$4.6 billion in wages and salaries and 173.2 thousand jobs.

Travel-related expenditures occurred throughout all ninety-five counties in Tennessee. The top five counties in Tennessee received \$7.7 billion in direct domestic travel expenditures, 72.8 percent of the state total. The top five counties also earned nearly \$4 billion in payroll (86.8 percent of the state total) and 141.4 thousand jobs (81.7 percent of the state total) in 2003.

Additionally, domestic travel in the top five counties generated \$389.7 million in tax revenue for the state treasury and \$206.7 million tax revenue for local governments during 2003.

Domestic Travel Impact in Top 5 Counties

Davidson County, which includes the city of Nashville, led all counties in 2003. Domestic travel expenditures in Davidson registered over \$3 billion, accounting for 28.7 percent of the state total. More than \$1.5 billion in payroll income and 56.7 thousand jobs were created in this county.

Shelby County ranked second with nearly \$2.4 billion in domestic travel spending in 2003, representing 22.4 percent of the state total. The county's payroll income of nearly \$1.8 billion was paid to nearly 50.7 thousand workers.

Sevier County posted more than \$1.1 billion in domestic expenditures to rank third. These expenditures generated nearly \$313 million in payroll as well as 17.7 thousand jobs within the county.

Knox County received more than \$599 million from U.S. travelers, 5.7 percent of the state total. This county benefited from nearly \$230 million in wages and salaries and almost 9 thousand jobs.

Hamilton County ranked fifth with nearly \$563 million in domestic travel expenditures, nearly \$146 million in payroll income and 7.4 thousand jobs within the county during 2003.

Table 14: Domestic Travel Impact in Tennessee - Top 5 Counties, 2002-2003

2003 Impact

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
DAVIDSON	\$3,040.64	\$1,522.18	56.72	\$152.68	\$78.71
SHELBY	2,370.26	1,772.25	50.65	106.82	67.34
SEVIER	1,133.54	312.80	17.71	63.77	33.49
KNOX	599.01	229.68	8.97	33.00	14.57
HAMILTON	562.80	145.93	7.35	33.45	12.58
Top Five	\$7,706.3	\$3,982.8	141.4	\$389.7	\$206.7
STATE TOTALS	\$10,579.8	\$4,590.9	173.2	\$566.6	\$318.5
Share of Top 5 Counties	72.8%	86.8%	81.7%	68.8%	64.9%

2002 Impact

DAVIDSON	\$3,008.06	\$1,499.22	56.803	\$151.48	\$77.52
SHELBY	2,327.80	1,732.82	50.355	105.21	65.84
SEVIER	1,114.46	306.17	17.629	62.88	32.78
KNOX	569.25	217.31	8.632	31.45	13.78
HAMILTON	533.73	137.78	7.057	31.82	11.87
Top Five	\$7,553.3	\$3,893.3	\$140.5	\$382.8	\$201.8
STATE TOTALS	\$10,298.0	\$4,472.0	\$171.2	\$552.2	\$308.9
Share of Top 5 Counties	73.3%	87.1%	82.1%	69.3%	65.3%

**Percent Change
2003 Over 2002**

DAVIDSON	1.1%	1.5%	-0.1%	0.8%	1.5%
SHELBY	1.8%	2.3%	0.6%	1.5%	2.3%
SEVIER	1.7%	2.2%	0.5%	1.4%	2.2%
KNOX	5.2%	5.7%	4.0%	4.9%	5.7%
HAMILTON	5.4%	5.9%	4.2%	5.1%	5.9%
Top Five	2.0%	2.3%	0.7%	1.8%	2.4%
STATE TOTALS	2.7%	2.7%	1.2%	2.6%	3.1%

Source: TIA

COUNTY TABLES

The following tables list the results of the County Economic Impact Component of the TIA's Travel Economic Impact Model for Tennessee in 2003 and 2002. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2003 travel expenditures, travel-generated payroll and employment, and state tax revenue and the local tax revenue for each.

Table B ranks the counties in order of 2003 travel expenditures from highest to lowest.

Table C indicates the percent of the state totals accounted for by each county in 2003.

Table D shows the percent change in 2003 over 2002 estimates for each of the measures of economic impact.

Table E shows the counties, listed alphabetically, with 2002 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue shown for each.

Table F shows the counties grouped by region with each measure of travel impact in 2003.

Table G indicates the counties grouped by region with 2003 and 2002 travel expenditures, shown with the percent change in 2003 over 2002.

Table H shows the percent change in 2003 over 2002 estimates, with the counties grouped by region.

Table I indicates the counties grouped by region, with 2002 estimates for each measure of travel impact.

Table J shows each measure of travel impact for each region in 2003.

Table K shows each measure of travel impact with 2002 estimates by each region.

Table L indicates the percent change in each measure of travel impact in 2003 over 2002 for each Tennessee region.

Table A: Alphabetical by County

2003 Impact of Travel on Tennessee					
Table A: Alphabetical by County					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
ANDERSON	\$71.63	\$14.06	0.84	\$4.55	\$1.56
BEDFORD	19.63	3.97	0.21	1.19	0.78
BENTON	17.20	3.23	0.15	1.10	1.86
BLEDSON	2.67	0.45	0.02	0.16	0.43
BLOUNT	193.82	60.14	2.63	11.21	6.75
BRADLEY	85.95	16.53	1.00	5.46	1.85
CAMPBELL	39.11	8.04	0.47	2.33	2.06
CANNON	2.87	0.33	0.01	0.19	0.20
CARROLL	12.43	2.00	0.11	0.77	0.48
CARTER	21.68	3.48	0.16	1.39	1.38
CHEATHAM	12.79	2.61	0.13	0.76	0.44
CHESTER	6.23	0.75	0.03	0.43	0.20
CLAIBORNE	11.69	2.31	0.13	0.70	0.89
CLAY	5.59	1.43	0.06	0.32	0.50
COCKE	29.82	6.58	0.42	1.79	1.34
COFFEE	50.27	10.35	0.60	3.09	1.34
CROCKETT	5.62	1.04	0.06	0.33	0.25
CUMBERLAND	75.35	18.84	1.00	4.45	3.20
DAVIDSON	3,040.64	1,522.18	56.72	152.68	78.71
DECATUR	8.13	1.26	0.04	0.51	1.46
DEKALB	27.17	6.22	0.27	1.60	3.62
DICKSON	38.25	7.77	0.49	2.36	0.95
DYER	28.41	5.58	0.34	1.81	0.68
FAYETTE	4.93	0.71	0.03	0.30	0.27
FENTRESS	9.22	1.68	0.09	0.56	0.63
FRANKLIN	14.48	2.53	0.13	0.93	0.69
GIBSON	24.50	3.40	0.18	1.65	0.74

Table A: Alphabetical by County

2003 Impact of Travel on Tennessee**Table A: Alphabetical by County (Continued)**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
GILES	15.79	2.67	0.15	1.02	0.69
GRAINGER	11.13	2.02	0.08	0.65	2.18
GREENE	54.58	10.36	0.54	3.44	1.48
GRUNDY	5.77	0.81	0.02	0.37	1.04
HAMBLEN	58.25	10.54	0.58	3.80	1.30
HAMILTON	562.80	145.93	7.35	33.45	12.58
HANCOCK	0.90	0.12	0.01	0.05	0.19
HARDEMAN	17.13	2.84	0.15	1.08	0.99
HARDIN	24.94	4.80	0.20	1.56	2.16
HAWKINS	23.13	4.13	0.22	1.38	1.29
HAYWOOD	10.11	1.68	0.09	0.65	0.45
HENDERSON	15.25	2.54	0.14	0.98	0.49
HENRY	37.42	7.32	0.31	2.25	4.85
HICKMAN	5.39	0.92	0.04	0.32	0.53
HOUSTON	4.19	0.77	0.04	0.25	0.46
HUMPHREYS	22.22	4.85	0.25	1.22	1.48
JACKSON	1.74	0.28	0.01	0.11	0.22
JEFFERSON	33.08	6.83	0.35	2.05	2.45
JOHNSON	7.53	1.51	0.07	0.45	0.59
KNOX	599.01	229.68	8.97	33.00	14.57
LAKE	7.96	1.94	0.12	0.46	0.60
LAUDERDALE	12.04	1.85	0.09	0.73	0.98
LAWRENCE	26.67	4.61	0.23	1.73	0.74
LEWIS	4.29	0.79	0.05	0.26	0.21
LINCOLN	14.42	2.38	0.13	0.94	0.47
LOUDON	28.00	5.37	0.31	1.77	0.72
MCMINN	28.15	4.85	0.28	1.76	0.71

Table A: Alphabetical by County

2003 Impact of Travel on Tennessee**Table A: Alphabetical by County (Continued)**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
MCNAIRY	7.10	1.17	0.05	0.43	0.40
MACON	4.88	0.85	0.05	0.29	0.26
MADISON	125.25	27.63	1.65	7.66	2.73
MARION	22.11	4.27	0.25	1.36	0.82
MARSHALL	17.14	3.40	0.17	1.10	0.46
MAURY	70.04	11.62	0.65	4.42	1.48
MEIGS	5.72	1.16	0.04	0.33	0.76
MONROE	28.71	5.80	0.31	1.73	1.97
MONTGOMERY	110.30	21.58	1.23	7.16	2.14
MOORE	1.04	0.18	0.01	0.06	0.06
MORGAN	3.27	0.42	0.01	0.21	0.42
OBION	32.67	6.40	0.35	2.03	1.00
OVERTON	5.62	0.92	0.04	0.36	0.36
PERRY	4.79	0.79	0.02	0.26	1.27
PICKETT	5.64	1.41	0.06	0.33	0.84
POLK	16.54	4.56	0.20	0.96	1.55
PUTNAM	72.73	13.61	0.82	4.53	1.50
RHEA	23.95	4.90	0.26	1.45	1.62
ROANE	42.31	7.76	0.44	2.64	2.23
ROBERTSON	23.63	3.92	0.21	1.59	0.64
RUTHERFORD	164.79	31.59	1.85	10.40	3.58
SCOTT	8.60	1.53	0.09	0.49	0.52
SEQUATCHIE	4.86	0.83	0.03	0.30	0.36
SEVIER	1,133.54	312.80	17.71	63.77	33.49
SHELBY	2,370.26	1,772.25	50.65	106.82	67.34
SMITH	7.34	1.11	0.05	0.47	0.33
STEWART	5.56	0.86	0.03	0.34	0.84

Table A: Alphabetical by County

2003 Impact of Travel on Tennessee**Table A: Alphabetical by County (Continued)**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
SULLIVAN	208.72	67.27	2.80	12.02	5.80
SUMNER	67.75	13.09	0.74	4.30	1.57
TIPTON	17.93	2.84	0.15	1.17	0.59
TROUSDALE	2.49	0.33	0.02	0.15	0.08
UNICOI	6.18	1.54	0.08	0.36	0.51
UNION	4.93	0.92	0.03	0.29	0.74
VAN BUREN	6.92	1.82	0.07	0.40	0.74
WARREN	19.67	3.57	0.18	1.22	0.80
WASHINGTON	148.00	30.37	1.72	9.11	3.49
WAYNE	7.90	1.59	0.08	0.48	0.51
WEAKLEY	12.85	2.13	0.11	0.81	0.44
WHITE	12.47	1.60	0.07	0.83	0.60
WILLIAMSON	180.61	35.36	2.01	11.12	3.76
WILSON	72.99	15.28	0.82	4.52	2.19
STATE TOTALS	\$10,579.80	\$4,590.88	173.19	\$566.62	\$318.48

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Table B: Ranking of Counties by Expenditure Levels

2003 Impact of Travel on Tennessee					
Table B: Ranking of Counties by Expenditure Levels					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
DAVIDSON	\$3,040.64	\$1,522.18	56.72	\$152.68	\$78.71
SHELBY	2,370.26	1,772.25	50.65	106.82	67.34
SEVIER	1,133.54	312.80	17.71	63.77	33.49
KNOX	599.01	229.68	8.97	33.00	14.57
HAMILTON	562.80	145.93	7.35	33.45	12.58
SULLIVAN	208.72	67.27	2.80	12.02	5.80
BLOUNT	193.82	60.14	2.63	11.21	6.75
WILLIAMSON	180.61	35.36	2.01	11.12	3.76
RUTHERFORD	164.79	31.59	1.85	10.40	3.58
WASHINGTON	148.00	30.37	1.72	9.11	3.49
MADISON	125.25	27.63	1.65	7.66	2.73
MONTGOMERY	110.30	21.58	1.23	7.16	2.14
BRADLEY	85.95	16.53	1.00	5.46	1.85
CUMBERLAND	75.35	18.84	1.00	4.45	3.20
WILSON	72.99	15.28	0.82	4.52	2.19
PUTNAM	72.73	13.61	0.82	4.53	1.50
ANDERSON	71.63	14.06	0.84	4.55	1.56
MAURY	70.04	11.62	0.65	4.42	1.48
SUMNER	67.75	13.09	0.74	4.30	1.57
HAMBLEN	58.25	10.54	0.58	3.80	1.30
GREENE	54.58	10.36	0.54	3.44	1.48
COFFEE	50.27	10.35	0.60	3.09	1.34
ROANE	42.31	7.76	0.44	2.64	2.23
CAMPBELL	39.11	8.04	0.47	2.33	2.06
DICKSON	38.25	7.77	0.49	2.36	0.95
HENRY	37.42	7.32	0.31	2.25	4.85
JEFFERSON	33.08	6.83	0.35	2.05	2.45

Table B: Ranking of Counties by Expenditure Levels

2003 Impact of Travel on Tennessee**Table B: Ranking of Counties by Expenditure Levels (Continued)**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
OBION	32.67	6.40	0.35	2.03	1.00
COCKE	29.82	6.58	0.42	1.79	1.34
MONROE	28.71	5.80	0.31	1.73	1.97
DYER	28.41	5.58	0.34	1.81	0.68
MCMINN	28.15	4.85	0.28	1.76	0.71
LOUDON	28.00	5.37	0.31	1.77	0.72
DEKALB	27.17	6.22	0.27	1.60	3.62
LAWRENCE	26.67	4.61	0.23	1.73	0.74
HARDIN	24.94	4.80	0.20	1.56	2.16
GIBSON	24.50	3.40	0.18	1.65	0.74
RHEA	23.95	4.90	0.26	1.45	1.62
ROBERTSON	23.63	3.92	0.21	1.59	0.64
HAWKINS	23.13	4.13	0.22	1.38	1.29
HUMPHREYS	22.22	4.85	0.25	1.22	1.48
MARION	22.11	4.27	0.25	1.36	0.82
CARTER	21.68	3.48	0.16	1.39	1.38
WARREN	19.67	3.57	0.18	1.22	0.80
BEDFORD	19.63	3.97	0.21	1.19	0.78
TIPTON	17.93	2.84	0.15	1.17	0.59
BENTON	17.20	3.23	0.15	1.10	1.86
MARSHALL	17.14	3.40	0.17	1.10	0.46
HARDEMAN	17.13	2.84	0.15	1.08	0.99
POLK	16.54	4.56	0.20	0.96	1.55
GILES	15.79	2.67	0.15	1.02	0.69
HENDERSON	15.25	2.54	0.14	0.98	0.49
FRANKLIN	14.48	2.53	0.13	0.93	0.69
LINCOLN	14.42	2.38	0.13	0.94	0.47

Table B: Ranking of Counties by Expenditure Levels

2003 Impact of Travel on Tennessee**Table B: Ranking of Counties by Expenditure Levels (Continued)**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
WEAKLEY	12.85	2.13	0.11	0.81	0.44
CHEATHAM	12.79	2.61	0.13	0.76	0.44
WHITE	12.47	1.60	0.07	0.83	0.60
CARROLL	12.43	2.00	0.11	0.77	0.48
LAUDERDALE	12.04	1.85	0.09	0.73	0.98
CLAIBORNE	11.69	2.31	0.13	0.70	0.89
GRAINGER	11.13	2.02	0.08	0.65	2.18
HAYWOOD	10.11	1.68	0.09	0.65	0.45
FENTRESS	9.22	1.68	0.09	0.56	0.63
SCOTT	8.60	1.53	0.09	0.49	0.52
DECATUR	8.13	1.26	0.04	0.51	1.46
LAKE	7.96	1.94	0.12	0.46	0.60
WAYNE	7.90	1.59	0.08	0.48	0.51
JOHNSON	7.53	1.51	0.07	0.45	0.59
SMITH	7.34	1.11	0.05	0.47	0.33
MCNAIRY	7.10	1.17	0.05	0.43	0.40
VAN BUREN	6.92	1.82	0.07	0.40	0.74
CHESTER	6.23	0.75	0.03	0.43	0.20
UNICOI	6.18	1.54	0.08	0.36	0.51
GRUNDY	5.77	0.81	0.02	0.37	1.04
MEIGS	5.72	1.16	0.04	0.33	0.76
PICKETT	5.64	1.41	0.06	0.33	0.84
CROCKETT	5.62	1.04	0.06	0.33	0.25
OVERTON	5.62	0.92	0.04	0.36	0.36
CLAY	5.59	1.43	0.06	0.32	0.50
STEWART	5.56	0.86	0.03	0.34	0.84
HICKMAN	5.39	0.92	0.04	0.32	0.53

Table B: Ranking of Counties by Expenditure Levels

2003 Impact of Travel on Tennessee**Table B: Ranking of Counties by Expenditure Levels (Continued)**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
UNION	4.93	0.92	0.03	0.29	0.74
FAYETTE	4.93	0.71	0.03	0.30	0.27
MACON	4.88	0.85	0.05	0.29	0.26
SEQUATCHIE	4.86	0.83	0.03	0.30	0.36
PERRY	4.79	0.79	0.02	0.26	1.27
LEWIS	4.29	0.79	0.05	0.26	0.21
HOUSTON	4.19	0.77	0.04	0.25	0.46
MORGAN	3.27	0.42	0.01	0.21	0.42
CANNON	2.87	0.33	0.01	0.19	0.20
BLEDSON	2.67	0.45	0.02	0.16	0.43
TROUSDALE	2.49	0.33	0.02	0.15	0.08
JACKSON	1.74	0.28	0.01	0.11	0.22
MOORE	1.04	0.18	0.01	0.06	0.06
HANCOCK	0.90	0.12	0.01	0.05	0.19
STATE TOTALS	\$10,579.80	\$4,590.88	173.19	\$566.62	\$318.48

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Table C: Percent Distribution by County

2003 Impact of Travel on Tennessee**Table C: Percent Distribution by County**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ANDERSON	0.68%	0.31%	0.48%	0.80%	0.49%
BEDFORD	0.19%	0.09%	0.12%	0.21%	0.24%
BENTON	0.16%	0.07%	0.09%	0.19%	0.58%
BLEDSON	0.03%	0.01%	0.01%	0.03%	0.14%
BLOUNT	1.83%	1.31%	1.52%	1.98%	2.12%
BRADLEY	0.81%	0.36%	0.58%	0.96%	0.58%
CAMPBELL	0.37%	0.18%	0.27%	0.41%	0.65%
CANNON	0.03%	0.01%	0.01%	0.03%	0.06%
CARROLL	0.12%	0.04%	0.06%	0.14%	0.15%
CARTER	0.20%	0.08%	0.09%	0.25%	0.43%
CHEATHAM	0.12%	0.06%	0.07%	0.13%	0.14%
CHESTER	0.06%	0.02%	0.02%	0.08%	0.06%
CLAIBORNE	0.11%	0.05%	0.07%	0.12%	0.28%
CLAY	0.05%	0.03%	0.03%	0.06%	0.16%
COCKE	0.28%	0.14%	0.25%	0.32%	0.42%
COFFEE	0.48%	0.23%	0.35%	0.54%	0.42%
CROCKETT	0.05%	0.02%	0.04%	0.06%	0.08%
CUMBERLAND	0.71%	0.41%	0.58%	0.79%	1.00%
DAVIDSON	28.74%	33.16%	32.75%	26.95%	24.71%
DECATUR	0.08%	0.03%	0.02%	0.09%	0.46%
DEKALB	0.26%	0.14%	0.16%	0.28%	1.14%
DICKSON	0.36%	0.17%	0.28%	0.42%	0.30%
DYER	0.27%	0.12%	0.19%	0.32%	0.21%
FAYETTE	0.05%	0.02%	0.02%	0.05%	0.09%
FENTRESS	0.09%	0.04%	0.05%	0.10%	0.20%
FRANKLIN	0.14%	0.06%	0.07%	0.16%	0.22%
GIBSON	0.23%	0.07%	0.10%	0.29%	0.23%

Table C: Percent Distribution by County

2003 Impact of Travel on Tennessee**Table C: Percent Distribution by County (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
GILES	0.15%	0.06%	0.08%	0.18%	0.22%
GRAINGER	0.11%	0.04%	0.05%	0.12%	0.68%
GREENE	0.52%	0.23%	0.31%	0.61%	0.46%
GRUNDY	0.05%	0.02%	0.01%	0.06%	0.33%
HAMBLEN	0.55%	0.23%	0.33%	0.67%	0.41%
HAMILTON	5.32%	3.18%	4.24%	5.90%	3.95%
HANCOCK	0.01%	0.00%	0.01%	0.01%	0.06%
HARDEMAN	0.16%	0.06%	0.09%	0.19%	0.31%
HARDIN	0.24%	0.10%	0.12%	0.27%	0.68%
HAWKINS	0.22%	0.09%	0.12%	0.24%	0.41%
HAYWOOD	0.10%	0.04%	0.05%	0.12%	0.14%
HENDERSON	0.14%	0.06%	0.08%	0.17%	0.16%
HENRY	0.35%	0.16%	0.18%	0.40%	1.52%
HICKMAN	0.05%	0.02%	0.02%	0.06%	0.17%
HOUSTON	0.04%	0.02%	0.02%	0.04%	0.14%
HUMPHREYS	0.21%	0.11%	0.15%	0.22%	0.47%
JACKSON	0.02%	0.01%	0.01%	0.02%	0.07%
JEFFERSON	0.31%	0.15%	0.20%	0.36%	0.77%
JOHNSON	0.07%	0.03%	0.04%	0.08%	0.18%
KNOX	5.66%	5.00%	5.18%	5.82%	4.57%
LAKE	0.08%	0.04%	0.07%	0.08%	0.19%
LAUDERDALE	0.11%	0.04%	0.05%	0.13%	0.31%
LAWRENCE	0.25%	0.10%	0.13%	0.31%	0.23%
LEWIS	0.04%	0.02%	0.03%	0.05%	0.07%
LINCOLN	0.14%	0.05%	0.08%	0.17%	0.15%
LOUDON	0.26%	0.12%	0.18%	0.31%	0.23%
MCMINN	0.27%	0.11%	0.16%	0.31%	0.22%

Table C: Percent Distribution by County

2003 Impact of Travel on Tennessee**Table C: Percent Distribution by County (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
MCNAIRY	0.07%	0.03%	0.03%	0.08%	0.13%
MACON	0.05%	0.02%	0.03%	0.05%	0.08%
MADISON	1.18%	0.60%	0.95%	1.35%	0.86%
MARION	0.21%	0.09%	0.14%	0.24%	0.26%
MARSHALL	0.16%	0.07%	0.10%	0.19%	0.14%
MAURY	0.66%	0.25%	0.37%	0.78%	0.47%
MEIGS	0.05%	0.03%	0.02%	0.06%	0.24%
MONROE	0.27%	0.13%	0.18%	0.31%	0.62%
MONTGOMERY	1.04%	0.47%	0.71%	1.26%	0.67%
MOORE	0.01%	0.00%	0.01%	0.01%	0.02%
MORGAN	0.03%	0.01%	0.01%	0.04%	0.13%
OBION	0.31%	0.14%	0.20%	0.36%	0.31%
OVERTON	0.05%	0.02%	0.03%	0.06%	0.11%
PERRY	0.05%	0.02%	0.01%	0.05%	0.40%
PICKETT	0.05%	0.03%	0.03%	0.06%	0.26%
POLK	0.16%	0.10%	0.11%	0.17%	0.49%
PUTNAM	0.69%	0.30%	0.47%	0.80%	0.47%
RHEA	0.23%	0.11%	0.15%	0.26%	0.51%
ROANE	0.40%	0.17%	0.25%	0.47%	0.70%
ROBERTSON	0.22%	0.09%	0.12%	0.28%	0.20%
RUTHERFORD	1.56%	0.69%	1.07%	1.84%	1.12%
SCOTT	0.08%	0.03%	0.05%	0.09%	0.16%
SEQUATCHIE	0.05%	0.02%	0.02%	0.05%	0.11%
SEVIER	10.71%	6.81%	10.23%	11.25%	10.52%
SHELBY	22.40%	38.60%	29.25%	18.85%	21.15%
SMITH	0.07%	0.02%	0.03%	0.08%	0.10%
STEWART	0.05%	0.02%	0.02%	0.06%	0.26%

Table C: Percent Distribution by County

2003 Impact of Travel on Tennessee**Table C: Percent Distribution by County (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SULLIVAN	1.97%	1.47%	1.62%	2.12%	1.82%
SUMNER	0.64%	0.29%	0.43%	0.76%	0.49%
TIPTON	0.17%	0.06%	0.09%	0.21%	0.18%
TROUSDALE	0.02%	0.01%	0.01%	0.03%	0.03%
UNICOI	0.06%	0.03%	0.04%	0.06%	0.16%
UNION	0.05%	0.02%	0.02%	0.05%	0.23%
VAN BUREN	0.07%	0.04%	0.04%	0.07%	0.23%
WARREN	0.19%	0.08%	0.10%	0.22%	0.25%
WASHINGTON	1.40%	0.66%	0.99%	1.61%	1.10%
WAYNE	0.07%	0.03%	0.04%	0.08%	0.16%
WEAKLEY	0.12%	0.05%	0.07%	0.14%	0.14%
WHITE	0.12%	0.03%	0.04%	0.15%	0.19%
WILLIAMSON	1.71%	0.77%	1.16%	1.96%	1.18%
WILSON	0.69%	0.33%	0.47%	0.80%	0.69%
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change Over 2002

2003 Impact of Travel on Tennessee					
Table D: Percent Change Over 2002					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ANDERSON	2.95%	3.41%	1.71%	2.65%	3.41%
BEDFORD	-0.78%	-0.34%	-1.98%	-1.06%	-0.33%
BENTON	5.65%	6.12%	4.37%	5.34%	6.12%
BLEDSON	-0.12%	0.32%	-1.33%	-0.41%	0.33%
BLOUNT	4.14%	4.60%	2.88%	3.84%	4.61%
BRADLEY	4.60%	5.06%	3.33%	4.30%	5.07%
CAMPBELL	5.34%	5.81%	4.07%	5.04%	5.82%
CANNON	3.02%	3.47%	1.77%	2.72%	3.48%
CARROLL	3.32%	3.78%	2.07%	3.03%	3.79%
CARTER	2.29%	2.74%	1.05%	1.99%	2.75%
CHEATHAM	1.45%	1.90%	0.22%	1.16%	1.91%
CHESTER	11.04%	11.53%	9.69%	10.72%	11.54%
CLAIBORNE	0.83%	1.28%	-0.38%	0.54%	1.29%
CLAY	5.61%	6.08%	4.34%	5.31%	6.09%
COCKE	1.57%	2.02%	0.34%	1.27%	2.02%
COFFEE	9.21%	9.69%	7.89%	8.89%	9.70%
CROCKETT	1.02%	1.47%	-0.20%	0.73%	1.47%
CUMBERLAND	2.94%	3.40%	1.70%	2.64%	3.40%
DAVIDSON	1.08%	1.53%	-0.14%	0.79%	1.54%
DECATUR	4.09%	4.55%	2.83%	3.79%	4.56%
DEKALB	10.94%	11.44%	9.60%	10.62%	11.44%
DICKSON	5.51%	5.98%	4.24%	5.21%	5.99%
DYER	4.95%	5.42%	3.68%	4.65%	5.42%
FAYETTE	2.03%	2.48%	0.79%	1.73%	2.48%
FENTRESS	1.52%	1.97%	0.29%	1.22%	1.97%
FRANKLIN	5.95%	6.42%	4.67%	5.64%	6.43%
GIBSON	7.71%	8.19%	6.41%	7.40%	8.20%

Table D: Percent Change Over 2002

2003 Impact of Travel on Tennessee**Table D: Percent Change Over 2002 (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
GILES	3.85%	4.31%	2.60%	3.55%	4.32%
GRAINGER	-1.87%	-1.43%	-3.06%	-2.15%	-1.43%
GREENE	4.50%	4.96%	3.24%	4.20%	4.97%
GRUNDY	2.77%	3.23%	1.53%	2.47%	3.23%
HAMBLEN	5.19%	5.66%	3.92%	4.89%	5.66%
HAMILTON	5.45%	5.92%	4.17%	5.14%	5.92%
HANCOCK	2.46%	2.91%	1.22%	2.16%	2.92%
HARDEMAN	5.05%	5.52%	3.78%	4.75%	5.52%
HARDIN	1.02%	1.47%	-0.20%	0.73%	1.47%
HAWKINS	2.04%	2.50%	0.81%	1.75%	2.50%
HAYWOOD	-1.25%	-0.81%	-2.45%	-1.54%	-0.81%
HENDERSON	0.41%	0.86%	-0.80%	0.12%	0.86%
HENRY	-0.02%	0.42%	-1.23%	-0.31%	0.43%
HICKMAN	0.86%	1.31%	-0.36%	0.57%	1.32%
HOUSTON	1.44%	1.89%	0.22%	1.15%	1.90%
HUMPHREYS	-1.31%	-0.87%	-2.50%	-1.60%	-0.87%
JACKSON	1.16%	1.61%	-0.06%	0.87%	1.62%
JEFFERSON	-0.23%	0.21%	-1.44%	-0.52%	0.21%
JOHNSON	3.27%	3.73%	2.03%	2.98%	3.74%
KNOX	5.23%	5.70%	3.96%	4.93%	5.70%
LAKE	-5.45%	-5.03%	-6.59%	-5.72%	-5.02%
LAUDERDALE	1.70%	2.15%	0.47%	1.41%	2.16%
LAWRENCE	5.20%	5.67%	3.93%	4.90%	5.68%
LEWIS	3.53%	3.99%	2.28%	3.23%	3.99%
LINCOLN	3.04%	3.50%	1.80%	2.74%	3.51%
LOUDON	3.39%	3.85%	2.14%	3.09%	3.86%
MCMINN	9.87%	10.35%	8.54%	9.55%	10.36%

Table D: Percent Change Over 2002

2003 Impact of Travel on Tennessee					
Table D: Percent Change Over 2002 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
MCNAIRY	0.85%	1.29%	-0.37%	0.55%	1.30%
MACON	7.28%	7.76%	5.98%	6.97%	7.76%
MADISON	3.08%	3.54%	1.83%	2.78%	3.54%
MARION	6.79%	7.26%	5.50%	6.48%	7.27%
MARSHALL	2.79%	3.25%	1.55%	2.49%	3.25%
MAURY	2.79%	3.25%	1.55%	2.49%	3.25%
MEIGS	0.26%	0.70%	-0.96%	-0.03%	0.71%
MONROE	6.12%	6.60%	4.84%	5.82%	6.60%
MONTGOMERY	5.38%	5.85%	4.11%	5.08%	5.86%
MOORE	-0.23%	0.21%	-1.44%	-0.52%	0.22%
MORGAN	2.72%	3.17%	1.48%	2.42%	3.18%
OBION	-0.11%	0.33%	-1.32%	-0.40%	0.34%
OVERTON	3.66%	4.12%	2.40%	3.36%	4.12%
PERRY	1.03%	1.48%	-0.19%	0.74%	1.49%
PICKETT	3.81%	4.27%	2.56%	3.51%	4.28%
POLK	0.28%	0.73%	-0.93%	-0.01%	0.73%
PUTNAM	7.01%	7.48%	5.71%	6.70%	7.49%
RHEA	7.15%	7.62%	5.85%	6.84%	7.63%
ROANE	6.90%	7.38%	5.61%	6.59%	7.38%
ROBERTSON	3.43%	3.88%	2.18%	3.13%	3.89%
RUTHERFORD	8.89%	9.37%	7.57%	8.58%	9.38%
SCOTT	5.56%	6.03%	4.28%	5.25%	6.03%
SEQUATCHIE	5.44%	5.91%	4.16%	5.13%	5.91%
SEVIER	1.71%	2.16%	0.48%	1.42%	2.17%
SHELBY	1.82%	2.28%	0.59%	1.53%	2.28%
SMITH	2.27%	2.72%	1.03%	1.97%	2.73%
STEWART	7.20%	7.68%	5.90%	6.89%	7.68%

Table D: Percent Change Over 2002

2003 Impact of Travel on Tennessee					
Table D: Percent Change Over 2002 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SULLIVAN	3.83%	4.30%	2.58%	3.54%	4.30%
SUMNER	2.83%	3.29%	1.59%	2.53%	3.29%
TIPTON	4.06%	4.52%	2.80%	3.76%	4.53%
TROUSDALE	1.86%	2.31%	0.62%	1.56%	2.31%
UNICOI	0.47%	0.92%	-0.74%	0.18%	0.92%
UNION	1.98%	2.43%	0.75%	1.69%	2.44%
VAN BUREN	1.15%	1.60%	-0.08%	0.85%	1.60%
WARREN	2.86%	3.31%	1.61%	2.56%	3.32%
WASHINGTON	7.93%	8.41%	6.63%	7.62%	8.42%
WAYNE	0.91%	1.36%	-0.31%	0.62%	1.37%
WEAKLEY	4.70%	5.16%	3.43%	4.40%	5.17%
WHITE	5.95%	6.42%	4.67%	5.65%	6.43%
WILLIAMSON	8.97%	9.46%	7.66%	8.66%	9.46%
WILSON	5.11%	5.58%	3.84%	4.81%	5.58%
STATE TOTALS	2.74%	2.66%	1.17%	2.60%	3.11%

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Table E: Alphabetical by County, 2002

2003 Impact of Travel on Tennessee					
Table E: Alphabetical by County, 2002					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
ANDERSON	\$69.58	\$13.59	0.823	\$4.43	\$1.51
BEDFORD	19.78	3.99	0.214	1.21	0.78
BENTON	16.28	3.05	0.146	1.04	1.75
BLED SOE	2.68	0.45	0.019	0.16	0.43
BLOUNT	186.12	57.50	2.553	10.79	6.45
BRADLEY	82.17	15.73	0.966	5.23	1.76
CAMPBELL	37.13	7.60	0.447	2.22	1.94
CANNON	2.78	0.32	0.011	0.18	0.20
CARROLL	12.03	1.93	0.106	0.75	0.46
CARTER	21.19	3.39	0.162	1.37	1.34
CHEATHAM	12.60	2.56	0.126	0.75	0.43
CHESTER	5.61	0.67	0.029	0.39	0.18
CLAIBORNE	11.60	2.28	0.128	0.69	0.88
CLAY	5.29	1.35	0.055	0.30	0.47
COCKE	29.36	6.45	0.424	1.77	1.32
COFFEE	46.03	9.44	0.556	2.83	1.22
CROCKETT	5.56	1.03	0.065	0.33	0.25
CUMBERLAND	73.20	18.22	0.981	4.34	3.10
DAVIDSON	3,008.06	1,499.22	56.803	151.48	77.52
DECATUR	7.81	1.21	0.040	0.49	1.40
DEKALB	24.49	5.58	0.246	1.44	3.25
DICKSON	36.25	7.33	0.470	2.24	0.90
DYER	27.07	5.29	0.325	1.73	0.64
FAYETTE	4.83	0.70	0.032	0.30	0.27
FENTRESS	9.08	1.65	0.091	0.55	0.62
FRANKLIN	13.67	2.38	0.120	0.88	0.65
GIBSON	22.75	3.14	0.167	1.54	0.69

Table E: Alphabetical by County, 2002

2003 Impact of Travel on Tennessee**Table E: Alphabetical by County, 2002 (Continued)**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
GILES	15.20	2.56	0.142	0.98	0.66
GRAINGER	11.34	2.05	0.085	0.67	2.21
GREENE	52.23	9.87	0.526	3.30	1.41
GRUNDY	5.62	0.78	0.020	0.36	1.01
HAMBLEN	55.37	9.97	0.557	3.62	1.23
HAMILTON	533.73	137.78	7.057	31.82	11.87
HANCOCK	0.88	0.12	0.010	0.05	0.19
HARDEMAN	16.31	2.69	0.144	1.03	0.94
HARDIN	24.69	4.74	0.203	1.55	2.13
HAWKINS	22.67	4.03	0.213	1.36	1.26
HAYWOOD	10.23	1.69	0.088	0.66	0.46
HENDERSON	15.19	2.51	0.138	0.98	0.49
HENRY	37.43	7.28	0.312	2.25	4.83
HICKMAN	5.34	0.91	0.043	0.32	0.52
HOUSTON	4.13	0.75	0.043	0.24	0.45
HUMPHREYS	22.51	4.89	0.260	1.24	1.50
JACKSON	1.72	0.28	0.010	0.11	0.21
JEFFERSON	33.16	6.82	0.351	2.06	2.45
JOHNSON	7.29	1.46	0.070	0.43	0.57
KNOX	569.25	217.31	8.632	31.45	13.78
LAKE	8.42	2.05	0.126	0.49	0.64
LAUDERDALE	11.84	1.81	0.088	0.72	0.96
LAWRENCE	25.35	4.36	0.217	1.65	0.70
LEWIS	4.15	0.76	0.049	0.25	0.20
LINCOLN	14.00	2.30	0.128	0.92	0.45
LOUDON	27.08	5.17	0.303	1.71	0.69
MCMINN	25.62	4.39	0.261	1.61	0.64

Table E: Alphabetical by County, 2002

2003 Impact of Travel on Tennessee					
Table E: Alphabetical by County, 2002 (Continued)					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
MCNAIRY	7.04	1.16	0.054	0.43	0.40
MACON	4.55	0.79	0.045	0.28	0.24
MADISON	121.51	26.69	1.620	7.45	2.64
MARION	20.70	3.98	0.236	1.27	0.76
MARSHALL	16.68	3.29	0.168	1.07	0.45
MAURY	68.14	11.25	0.637	4.31	1.44
MEIGS	5.70	1.15	0.040	0.33	0.75
MONROE	27.06	5.44	0.292	1.63	1.85
MONTGOMERY	104.67	20.39	1.179	6.81	2.02
MOORE	1.05	0.18	0.009	0.06	0.06
MORGAN	3.19	0.40	0.010	0.20	0.41
OBION	32.71	6.38	0.353	2.03	1.00
OVERTON	5.42	0.89	0.043	0.35	0.34
PERRY	4.74	0.77	0.018	0.26	1.25
PICKETT	5.43	1.35	0.055	0.32	0.80
POLK	16.49	4.52	0.199	0.96	1.54
PUTNAM	67.97	12.66	0.774	4.24	1.40
RHEA	22.35	4.55	0.243	1.36	1.51
ROANE	39.57	7.23	0.414	2.47	2.08
ROBERTSON	22.85	3.77	0.205	1.54	0.62
RUTHERFORD	151.33	28.88	1.722	9.58	3.27
SCOTT	8.15	1.44	0.086	0.47	0.49
SEQUATCHIE	4.61	0.79	0.031	0.28	0.34
SEVIER	1,114.46	306.17	17.629	62.88	32.78
SHELBY	2,327.80	1,732.82	50.355	105.21	65.84
SMITH	7.18	1.08	0.051	0.46	0.32
STEWART	5.19	0.80	0.031	0.32	0.78

Table E: Alphabetical by County, 2002

2003 Impact of Travel on Tennessee**Table E: Alphabetical by County, 2002 (Continued)**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
SULLIVAN	201.01	64.50	2.727	11.61	5.56
SUMNER	65.88	12.67	0.728	4.19	1.52
TIPTON	17.23	2.72	0.144	1.13	0.56
TROUSDALE	2.45	0.32	0.022	0.15	0.08
UNICOI	6.15	1.53	0.077	0.36	0.51
UNION	4.83	0.90	0.031	0.29	0.73
VAN BUREN	6.84	1.79	0.074	0.39	0.73
WARREN	19.12	3.45	0.178	1.19	0.77
WASHINGTON	137.12	28.01	1.612	8.46	3.22
WAYNE	7.83	1.57	0.076	0.47	0.50
WEAKLEY	12.27	2.03	0.110	0.77	0.42
WHITE	11.77	1.50	0.067	0.79	0.56
WILLIAMSON	165.74	32.31	1.871	10.24	3.43
WILSON	69.44	14.47	0.789	4.31	2.08
STATE TOTALS	\$10,297.98	\$4,471.96	171.19	\$552.25	\$308.86

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Table F: Alphabetical by Region, 2003

2003 Impact of U.S. Resident Travel on Tennessee					
Table F: Alphabetical by Region, 2003					
<u>Region/County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
NORTHEAST TENNESSEE REGION					
CARTER	\$21.68	\$3.48	0.16	\$1.39	\$1.38
GREENE	54.58	10.36	0.54	3.44	1.48
HANCOCK	0.90	0.12	0.01	0.05	0.19
HAWKINS	23.13	4.13	0.22	1.38	1.29
JOHNSON	7.53	1.51	0.07	0.45	0.59
SULLIVAN	208.72	67.27	2.80	12.02	5.80
UNICOI	6.18	1.54	0.08	0.36	0.51
WASHINGTON	148.00	30.37	1.72	9.11	3.49
Total	\$470.72	\$118.79	5.59	\$28.21	\$14.73
EAST TENNESSEE REGION					
ANDERSON	\$71.63	\$14.06	0.84	\$4.55	\$1.56
BLOUNT	193.82	60.14	2.63	11.21	6.75
CAMPBELL	39.11	8.04	0.47	2.33	2.06
CLAIBORNE	11.69	2.31	0.13	0.70	0.89
COCKE	29.82	6.58	0.42	1.79	1.34
GRAINGER	11.13	2.02	0.08	0.65	2.18
HAMBLEN	58.25	10.54	0.58	3.80	1.30
JEFFERSON	33.08	6.83	0.35	2.05	2.45
KNOX	599.01	229.68	8.97	33.00	14.57
LOUDON	28.00	5.37	0.31	1.77	0.72
MONROE	28.71	5.80	0.31	1.73	1.97
MORGAN	3.27	0.42	0.01	0.21	0.42
ROANE	42.31	7.76	0.44	2.64	2.23
SCOTT	8.60	1.53	0.09	0.49	0.52
SEVIER	1,133.54	312.80	17.71	63.77	33.49
UNION	4.93	0.92	0.03	0.29	0.74
Total	\$2,296.90	\$674.79	33.36	\$130.97	\$73.20

Table F: Alphabetical by Region, 2003

2003 Impact of U.S. Resident Travel on Tennessee**Table F: Alphabetical by Region, 2003 (Continued)**

<u>Region/County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$</u> <u>Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$</u> <u>Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$</u> <u>Millions)</u>
UPPER CUMBERLAND REGION					
CANNON	\$2.87	\$0.33	0.01	\$0.19	\$0.20
CLAY	5.59	1.43	0.06	0.32	0.50
CUMBERLAND	75.35	18.84	1.00	4.45	3.20
DEKALB	27.17	6.22	0.27	1.60	3.62
FENTRESS	9.22	1.68	0.09	0.56	0.63
JACKSON	1.74	0.28	0.01	0.11	0.22
MACON	4.88	0.85	0.05	0.29	0.26
OVERTON	5.62	0.92	0.04	0.36	0.36
PICKETT	5.64	1.41	0.06	0.33	0.84
PUTNAM	72.73	13.61	0.82	4.53	1.50
SMITH	7.34	1.11	0.05	0.47	0.33
VAN BUREN	6.92	1.82	0.07	0.40	0.74
WARREN	19.67	3.57	0.18	1.22	0.80
WHITE	12.47	1.60	0.07	0.83	0.60
Total	\$257.22	\$53.66	2.78	\$15.66	\$13.79
SOUTHEAST TENNESSEE REGION					
BLEDSON	\$2.67	\$0.45	0.02	\$0.16	\$0.43
BRADLEY	85.95	16.53	1.00	5.46	1.85
GRUNDY	5.77	0.81	0.02	0.37	1.04
HAMILTON	562.80	145.93	7.35	33.45	12.58
MCMINN	28.15	4.85	0.28	1.76	0.71
MARION	22.11	4.27	0.25	1.36	0.82
MEIGS	5.72	1.16	0.04	0.33	0.76
POLK	16.54	4.56	0.20	0.96	1.55
RHEA	23.95	4.90	0.26	1.45	1.62
SEQUATCHIE	4.86	0.83	0.03	0.30	0.36
Total	\$758.53	\$184.28	9.45	\$45.59	\$21.71

Table F: Alphabetical by Region, 2003

2003 Impact of U.S. Resident Travel on Tennessee					
Table F: Alphabetical by Region, 2003 (Continued)					
<u>Region/County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$</u> <u>Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$</u> <u>Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$</u> <u>Millions)</u>
MID-CUMBERLAND REGION					
CHEATHAM	\$12.79	\$2.61	0.13	\$0.76	\$0.44
DAVIDSON	3,040.64	1,522.18	56.72	152.68	78.71
DICKSON	38.25	7.77	0.49	2.36	0.95
HOUSTON	4.19	0.77	0.04	0.25	0.46
HUMPHREYS	22.22	4.85	0.25	1.22	1.48
MONTGOMERY	110.30	21.58	1.23	7.16	2.14
ROBERTSON	23.63	3.92	0.21	1.59	0.64
RUTHERFORD	164.79	31.59	1.85	10.40	3.58
STEWART	5.56	0.86	0.03	0.34	0.84
SUMNER	67.75	13.09	0.74	4.30	1.57
TROUSDALE	2.49	0.33	0.02	0.15	0.08
WILLIAMSON	180.61	35.36	2.01	11.12	3.76
WILSON	72.99	15.28	0.82	4.52	2.19
Total	\$3,746.21	\$1,660.18	64.55	\$196.84	\$96.85
SOUTH CENTRAL TENNESSEE REGION					
BEDFORD	\$19.63	\$3.97	0.21	\$1.19	\$0.78
COFFEE	50.27	10.35	0.60	3.09	1.34
FRANKLIN	14.48	2.53	0.13	0.93	0.69
GILES	15.79	2.67	0.15	1.02	0.69
HICKMAN	5.39	0.92	0.04	0.32	0.53
LAWRENCE	26.67	4.61	0.23	1.73	0.74
LEWIS	4.29	0.79	0.05	0.26	0.21
LINCOLN	14.42	2.38	0.13	0.94	0.47
MARSHALL	17.14	3.40	0.17	1.10	0.46
MAURY	70.04	11.62	0.65	4.42	1.48
MOORE	1.04	0.18	0.01	0.06	0.06
PERRY	4.79	0.79	0.02	0.26	1.27
WAYNE	7.90	1.59	0.08	0.48	0.51
Total	\$251.85	\$45.81	2.45	\$15.80	\$9.22

Table F: Alphabetical by Region, 2003

2003 Impact of U.S. Resident Travel on Tennessee**Table F: Alphabetical by Region, 2003 (Continued)**

<u>Region/County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$</u> <u>Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$</u> <u>Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$</u> <u>Millions)</u>
NORTHWEST TENNESSEE REGION					
BENTON	\$17.20	\$3.23	0.15	\$1.10	\$1.86
CARROLL	12.43	2.00	0.11	0.77	0.48
CROCKETT	5.62	1.04	0.06	0.33	0.25
DYER	28.41	5.58	0.34	1.81	0.68
GIBSON	24.50	3.40	0.18	1.65	0.74
HENRY	37.42	7.32	0.31	2.25	4.85
LAKE	7.96	1.94	0.12	0.46	0.60
OBION	32.67	6.40	0.35	2.03	1.00
WEAKLEY	12.85	2.13	0.11	0.81	0.44
Total	\$179.06	\$33.04	1.73	\$11.21	\$10.90
SOUTHWEST TENNESSEE REGION					
CHESTER	\$6.23	\$0.75	0.03	\$0.43	\$0.20
DECATUR	8.13	1.26	0.04	0.51	1.46
HARDEMAN	17.13	2.84	0.15	1.08	0.99
HARDIN	24.94	4.80	0.20	1.56	2.16
HAYWOOD	10.11	1.68	0.09	0.65	0.45
HENDERSON	15.25	2.54	0.14	0.98	0.49
MCNAIRY	7.10	1.17	0.05	0.43	0.40
MADISON	125.25	27.63	1.65	7.66	2.73
Total	\$214.14	\$42.67	2.35	\$13.30	\$8.89
MEMPHIS DELTA REGION					
FAYETTE	\$4.93	\$0.71	0.03	\$0.30	\$0.27
LAUDERDALE	12.04	1.85	0.09	0.73	0.98
SHELBY	2,370.26	1,772.25	50.65	106.82	67.34
TIPTON	17.93	2.84	0.15	1.17	0.59
Total	\$2,405.16	\$1,777.66	50.92	\$109.03	\$69.18

Table F: Alphabetical by Region, 2003

STATE TOTALS	\$10,579.80	\$4,590.88	\$173.19	\$566.62	\$318.48
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Table G: Change in Travel Spending From 2002 by Region

2003 Impact of Travel on Tennessee			
Table G: Change in Travel Spending from 2002 by Region			
<u>Region/County</u>	<u>2003 Travel Expenditures (\$ Millions)</u>	<u>2002 Travel Expenditures (\$ Millions)</u>	<u>Change 2003/2002 (Percent)</u>
NORTHEAST TENNESSEE REGION			
CARTER	\$21.68	\$21.19	2.3%
GREENE	54.58	52.23	4.5%
HANCOCK	0.90	0.88	2.5%
HAWKINS	23.13	22.67	2.0%
JOHNSON	7.53	7.29	3.3%
SULLIVAN	208.72	201.01	3.8%
UNICOI	6.18	6.15	0.5%
WASHINGTON	148.00	137.12	7.9%
Total	\$470.72	\$448.54	4.9%
EAST TENNESSEE REGION			
ANDERSON	\$71.63	\$69.58	3.0%
BLOUNT	193.82	186.12	4.1%
CAMPBELL	39.11	37.13	5.3%
CLAIBORNE	11.69	11.60	0.8%
COCKE	29.82	29.36	1.6%
GRAINGER	11.13	11.34	-1.9%
HAMBLEN	58.25	55.37	5.2%
JEFFERSON	33.08	33.16	-0.2%
KNOX	599.01	569.25	5.2%
LOUDON	28.00	27.08	3.4%
MONROE	28.71	27.06	6.1%
MORGAN	3.27	3.19	2.7%
ROANE	42.31	39.57	6.9%
SCOTT	8.60	8.15	5.6%
SEVIER	1,133.54	1,114.46	1.7%
UNION	4.93	4.83	2.0%
Total	\$2,296.90	\$2,227.23	3.1%

Table G: Change in Travel Spending From 2002 by Region

2003 Impact of Travel on Tennessee			
Table G: Change in Travel Spending from 2002 by Region (Continued)			
<u>Region/County</u>	<u>2003 Travel Expenditures (\$ Millions)</u>	<u>2002 Travel Expenditures (\$ Millions)</u>	<u>Change 2003/2002 (Percent)</u>
UPPER CUMBERLAND REGION			
CANNON	\$2.87	\$2.78	3.0%
CLAY	5.59	5.29	5.6%
CUMBERLAND	75.35	73.20	2.9%
DEKALB	27.17	24.49	10.9%
FENTRESS	9.22	9.08	1.5%
JACKSON	1.74	1.72	1.2%
MACON	4.88	4.55	7.3%
OVERTON	5.62	5.42	3.7%
PICKETT	5.64	5.43	3.8%
PUTNAM	72.73	67.97	7.0%
SMITH	7.34	7.18	2.3%
VAN BUREN	6.92	6.84	1.1%
WARREN	19.67	19.12	2.9%
WHITE	12.47	11.77	6.0%
Total	\$257.22	\$244.86	5.0%
SOUTHEAST TENNESSEE REGION			
BLEDSON	\$2.67	\$2.68	-0.1%
BRADLEY	85.95	82.17	4.6%
GRUNDY	5.77	5.62	2.8%
HAMILTON	562.80	533.73	5.4%
MCMINN	28.15	25.62	9.9%
MARION	22.11	20.70	6.8%
MEIGS	5.72	5.70	0.3%
POLK	16.54	16.49	0.3%
RHEA	23.95	22.35	7.1%
SEQUATCHIE	4.86	4.61	5.4%
Total	\$758.53	\$719.68	5.4%

Table G: Change in Travel Spending From 2002 by Region

2003 Impact of Travel on Tennessee			
Table G: Change in Travel Spending from 2002 by Region (Continued)			
<u>Region/County</u>	<u>2003 Travel Expenditures (\$ Millions)</u>	<u>2002 Travel Expenditures (\$ Millions)</u>	<u>Change 2003/2002 (Percent)</u>
MID-CUMBERLAND REGION			
CHEATHAM	\$12.79	\$12.60	1.4%
DAVIDSON	3,040.64	3,008.06	1.1%
DICKSON	38.25	36.25	5.5%
HOUSTON	4.19	4.13	1.4%
HUMPHREYS	22.22	22.51	-1.3%
MONTGOMERY	110.30	104.67	5.4%
ROBERTSON	23.63	22.85	3.4%
RUTHERFORD	164.79	151.33	8.9%
STEWART	5.56	5.19	7.2%
SUMNER	67.75	65.88	2.8%
TROUSDALE	2.49	2.45	1.9%
WILLIAMSON	180.61	165.74	9.0%
WILSON	72.99	69.44	5.1%
Total	\$3,746.21	\$3,671.10	2.0%
SOUTH CENTRAL TENNESSEE REGION			
BEDFORD	\$19.63	\$19.78	-0.8%
COFFEE	50.27	46.03	9.2%
FRANKLIN	14.48	13.67	5.9%
GILES	15.79	15.20	3.9%
HICKMAN	5.39	5.34	0.9%
LAWRENCE	26.67	25.35	5.2%
LEWIS	4.29	4.15	3.5%
LINCOLN	14.42	14.00	3.0%
MARSHALL	17.14	16.68	2.8%
MAURY	70.04	68.14	2.8%
MOORE	1.04	1.05	-0.2%
PERRY	4.79	4.74	1.0%
WAYNE	7.90	7.83	0.9%
Total	\$251.85	\$241.95	4.1%

Table G: Change in Travel Spending From 2002 by Region

2003 Impact of Travel on Tennessee			
Table G: Change in Travel Spending from 2002 by Region (Continued)			
<u>Region/County</u>	<u>2003 Travel Expenditures (\$ Millions)</u>	<u>2002 Travel Expenditures (\$ Millions)</u>	<u>Change 2003/2002 (Percent)</u>
NORTHWEST TENNESSEE REGION			
BENTON	\$17.20	\$16.28	5.6%
CARROLL	12.43	12.03	3.3%
CROCKETT	5.62	5.56	1.0%
DYER	28.41	27.07	5.0%
GIBSON	24.50	22.75	7.7%
HENRY	37.42	37.43	0.0%
LAKE	7.96	8.42	-5.4%
OBION	32.67	32.71	-0.1%
WEAKLEY	12.85	12.27	4.7%
<i>Total</i>	<i>\$179.06</i>	<i>\$174.52</i>	<i>2.6%</i>
SOUTHWEST TENNESSEE REGION			
CHESTER	\$6.23	\$5.61	11.0%
DECATUR	8.13	7.81	4.1%
HARDEMAN	17.13	16.31	5.1%
HARDIN	24.94	24.69	1.0%
HAYWOOD	10.11	10.23	-1.3%
HENDERSON	15.25	15.19	0.4%
MCNAIRY	7.10	7.04	0.8%
MADISON	125.25	121.51	3.1%
<i>Total</i>	<i>\$214.14</i>	<i>\$208.39</i>	<i>2.8%</i>
MEMPHIS DELTA REGION			
FAYETTE	\$4.93	\$4.83	2.0%
LAUDERDALE	12.04	11.84	1.7%
SHELBY	2,370.26	2,327.80	1.8%
TIPTON	17.93	17.23	4.1%
<i>Total</i>	<i>\$2,405.16</i>	<i>\$2,361.70</i>	<i>1.8%</i>
STATE TOTALS	\$10,579.80	\$10,297.98	2.7%

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Table H: Percent Change Over 2002 by Region

2003 Impact of Travel on Tennessee**Table H: Percent Change Over 2002 by Region**

<u>Region/County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
NORTHEAST TENNESSEE REGION					
CARTER	2.3%	2.7%	1.0%	2.0%	2.7%
GREENE	4.5%	5.0%	3.2%	4.2%	5.0%
HANCOCK	2.5%	2.9%	1.2%	2.2%	2.9%
HAWKINS	2.0%	2.5%	0.8%	1.7%	2.5%
JOHNSON	3.3%	3.7%	2.0%	3.0%	3.7%
SULLIVAN	3.8%	4.3%	2.6%	3.5%	4.3%
UNICOI	0.5%	0.9%	-0.7%	0.2%	0.9%
WASHINGTON	7.9%	8.4%	6.6%	7.6%	8.4%
Total	4.9%	5.2%	3.7%	4.7%	4.8%
EAST TENNESSEE REGION					
ANDERSON	3.0%	3.4%	1.7%	2.7%	3.4%
BLOUNT	4.1%	4.6%	2.9%	3.8%	4.6%
CAMPBELL	5.3%	5.8%	4.1%	5.0%	5.8%
CLAIBORNE	0.8%	1.3%	-0.4%	0.5%	1.3%
COCKE	1.6%	2.0%	0.3%	1.3%	2.0%
GRAINGER	-1.9%	-1.4%	-3.1%	-2.2%	-1.4%
HAMBLLEN	5.2%	5.7%	3.9%	4.9%	5.7%
JEFFERSON	-0.2%	0.2%	-1.4%	-0.5%	0.2%
KNOX	5.2%	5.7%	4.0%	4.9%	5.7%
LOUDON	3.4%	3.9%	2.1%	3.1%	3.9%
MONROE	6.1%	6.6%	4.8%	5.8%	6.6%
MORGAN	2.7%	3.2%	1.5%	2.4%	3.2%
ROANE	6.9%	7.4%	5.6%	6.6%	7.4%
SCOTT	5.6%	6.0%	4.3%	5.3%	6.0%
SEVIER	1.7%	2.2%	0.5%	1.4%	2.2%
UNION	2.0%	2.4%	0.7%	1.7%	2.4%
Total	3.1%	3.8%	1.8%	2.8%	3.4%

Table H: Percent Change Over 2002 by Region

2003 Impact of Travel on Tennessee**Table H: Percent Change Over 2002 by Region (Continued)**

<u>Region/County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
UPPER CUMBERLAND REGION					
CANNON	3.0%	3.5%	1.8%	2.7%	3.5%
CLAY	5.6%	6.1%	4.3%	5.3%	6.1%
CUMBERLAND	2.9%	3.4%	1.7%	2.6%	3.4%
DEKALB	10.9%	11.4%	9.6%	10.6%	11.4%
FENTRESS	1.5%	2.0%	0.3%	1.2%	2.0%
JACKSON	1.2%	1.6%	-0.1%	0.9%	1.6%
MACON	7.3%	7.8%	6.0%	7.0%	7.8%
OVERTON	3.7%	4.1%	2.4%	3.4%	4.1%
PICKETT	3.8%	4.3%	2.6%	3.5%	4.3%
PUTNAM	7.0%	7.5%	5.7%	6.7%	7.5%
SMITH	2.3%	2.7%	1.0%	2.0%	2.7%
VAN BUREN	1.1%	1.6%	-0.1%	0.9%	1.6%
WARREN	2.9%	3.3%	1.6%	2.6%	3.3%
WHITE	6.0%	6.4%	4.7%	5.6%	6.4%
Total	5.0%	5.4%	3.7%	4.8%	6.0%
SOUTHEAST TENNESSEE REGION					
BLEDSON	-0.1%	0.3%	-1.3%	-0.4%	0.3%
BRADLEY	4.6%	5.1%	3.3%	4.3%	5.1%
GRUNDY	2.8%	3.2%	1.5%	2.5%	3.2%
HAMILTON	5.4%	5.9%	4.2%	5.1%	5.9%
MCMINN	9.9%	10.4%	8.5%	9.5%	10.4%
MARION	6.8%	7.3%	5.5%	6.5%	7.3%
MEIGS	0.3%	0.7%	-1.0%	0.0%	0.7%
POLK	0.3%	0.7%	-0.9%	0.0%	0.7%
RHEA	7.1%	7.6%	5.9%	6.8%	7.6%
SEQUATCHIE	5.4%	5.9%	4.2%	5.1%	5.9%
Total	5.4%	5.8%	4.1%	5.1%	5.3%

Table H: Percent Change Over 2002 by Region

2003 Impact of Travel on Tennessee**Table H: Percent Change Over 2002 by Region (Continued)**

<u>Region/County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
MID-CUMBERLAND REGION					
CHEATHAM	1.4%	1.9%	0.2%	1.2%	1.9%
DAVIDSON	1.1%	1.5%	-0.1%	0.8%	1.5%
DICKSON	5.5%	6.0%	4.2%	5.2%	6.0%
HOUSTON	1.4%	1.9%	0.2%	1.1%	1.9%
HUMPHREYS	-1.3%	-0.9%	-2.5%	-1.6%	-0.9%
MONTGOMERY	5.4%	5.9%	4.1%	5.1%	5.9%
ROBERTSON	3.4%	3.9%	2.2%	3.1%	3.9%
RUTHERFORD	8.9%	9.4%	7.6%	8.6%	9.4%
STEWART	7.2%	7.7%	5.9%	6.9%	7.7%
SUMNER	2.8%	3.3%	1.6%	2.5%	3.3%
TROUSDALE	1.9%	2.3%	0.6%	1.6%	2.3%
WILLIAMSON	9.0%	9.5%	7.7%	8.7%	9.5%
WILSON	5.1%	5.6%	3.8%	4.8%	5.6%
Total	2.0%	2.0%	0.5%	1.9%	2.4%
SOUTH CENTRAL TENNESSEE REGION					
BEDFORD	-0.8%	-0.3%	-2.0%	-1.1%	-0.3%
COFFEE	9.2%	9.7%	7.9%	8.9%	9.7%
FRANKLIN	5.9%	6.4%	4.7%	5.6%	6.4%
GILES	3.9%	4.3%	2.6%	3.6%	4.3%
HICKMAN	0.9%	1.3%	-0.4%	0.6%	1.3%
LAWRENCE	5.2%	5.7%	3.9%	4.9%	5.7%
LEWIS	3.5%	4.0%	2.3%	3.2%	4.0%
LINCOLN	3.0%	3.5%	1.8%	2.7%	3.5%
MARSHALL	2.8%	3.2%	1.5%	2.5%	3.3%
MAURY	2.8%	3.2%	1.5%	2.5%	3.3%
MOORE	-0.2%	0.2%	-1.4%	-0.5%	0.2%
PERRY	1.0%	1.5%	-0.2%	0.7%	1.5%
WAYNE	0.9%	1.4%	-0.3%	0.6%	1.4%
Total	4.1%	4.7%	3.1%	3.8%	3.9%

Table H: Percent Change Over 2002 by Region

2003 Impact of Travel on Tennessee					
Table H: Percent Change Over 2002 by Region (Continued)					
<u>Region/County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
NORTHWEST TENNESSEE REGION					
BENTON	5.6%	6.1%	4.4%	5.3%	6.1%
CARROLL	3.3%	3.8%	2.1%	3.0%	3.8%
CROCKETT	1.0%	1.5%	-0.2%	0.7%	1.5%
DYER	5.0%	5.4%	3.7%	4.6%	5.4%
GIBSON	7.7%	8.2%	6.4%	7.4%	8.2%
HENRY	0.0%	0.4%	-1.2%	-0.3%	0.4%
LAKE	-5.4%	-5.0%	-6.6%	-5.7%	-5.0%
OBION	-0.1%	0.3%	-1.3%	-0.4%	0.3%
WEAKLEY	4.7%	5.2%	3.4%	4.4%	5.2%
<i>Total</i>	<i>2.6%</i>	<i>2.7%</i>	<i>1.1%</i>	<i>2.4%</i>	<i>2.2%</i>
SOUTHWEST TENNESSEE REGION					
CHESTER	11.0%	11.5%	9.7%	10.7%	11.5%
DECATUR	4.1%	4.6%	2.8%	3.8%	4.6%
HARDEMAN	5.1%	5.5%	3.8%	4.7%	5.5%
HARDIN	1.0%	1.5%	-0.2%	0.7%	1.5%
HAYWOOD	-1.3%	-0.8%	-2.4%	-1.5%	-0.8%
HENDERSON	0.4%	0.9%	-0.8%	0.1%	0.9%
MCNAIRY	0.8%	1.3%	-0.4%	0.6%	1.3%
MADISON	3.1%	3.5%	1.8%	2.8%	3.5%
<i>Total</i>	<i>2.8%</i>	<i>3.2%</i>	<i>1.5%</i>	<i>2.5%</i>	<i>3.1%</i>
MEMPHIS DELTA REGION					
FAYETTE	2.0%	2.5%	0.8%	1.7%	2.5%
LAUDERDALE	1.7%	2.2%	0.5%	1.4%	2.2%
SHELBY	1.8%	2.3%	0.6%	1.5%	2.3%
TIPTON	4.1%	4.5%	2.8%	3.8%	4.5%
<i>Total</i>	<i>1.8%</i>	<i>2.3%</i>	<i>0.6%</i>	<i>1.6%</i>	<i>2.3%</i>
STATE TOTALS	2.7%	2.7%	1.2%	2.6%	3.1%

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Table I: Alphabetical by Region, 2002

2003 Impact of U.S. Resident Travel on Tennessee**Table I: Alphabetical by Region, 2002**

	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
NORTHEAST TENNESSEE REGION					
CARTER	\$21.19	\$3.39	0.16	\$1.37	\$1.34
GREENE	52.23	9.87	0.53	3.30	1.41
HANCOCK	0.88	0.12	0.01	0.05	0.19
HAWKINS	22.67	4.03	0.21	1.36	1.26
JOHNSON	7.29	1.46	0.07	0.43	0.57
SULLIVAN	201.01	64.50	2.73	11.61	5.56
UNICOI	6.15	1.53	0.08	0.36	0.51
WASHINGTON	137.12	28.01	1.61	8.46	3.22
Total	\$448.54	\$112.91	5.40	\$26.95	\$14.05
EAST TENNESSEE REGION					
ANDERSON	\$69.58	\$13.59	0.82	\$4.43	\$1.51
BLOUNT	186.12	57.50	2.55	10.79	6.45
CAMPBELL	37.13	7.60	0.45	2.22	1.94
CLAIBORNE	11.60	2.28	0.13	0.69	0.88
COCKE	29.36	6.45	0.42	1.77	1.32
GRAINGER	11.34	2.05	0.09	0.67	2.21
HAMBLEN	55.37	9.97	0.56	3.62	1.23
JEFFERSON	33.16	6.82	0.35	2.06	2.45
KNOX	569.25	217.31	8.63	31.45	13.78
LOUDON	27.08	5.17	0.30	1.71	0.69
MONROE	27.06	5.44	0.29	1.63	1.85
MORGAN	3.19	0.40	0.01	0.20	0.41
ROANE	39.57	7.23	0.41	2.47	2.08
SCOTT	8.15	1.44	0.09	0.47	0.49
SEVIER	1,114.46	306.17	17.63	62.88	32.78
UNION	4.83	0.90	0.03	0.29	0.73
Total	\$2,227.23	\$650.32	32.77	\$127.36	\$70.80

Table I: Alphabetical by Region, 2002

2003 Impact of U.S. Resident Travel on Tennessee**Table I: Alphabetical by Region, 2002 (Continued)**

	Expenditures	Payroll	Employment	State Tax	Local Tax
		(\$		Receipts	Receipts
	(\$ Millions)	Millions)	(Thousands)	(\$ Millions)	(\$ Millions)
UPPER CUMBERLAND REGION					
CANNON	\$2.78	\$0.32	0.01	\$0.18	\$0.20
CLAY	5.29	1.35	0.05	0.30	0.47
CUMBERLAND	73.20	18.22	0.98	4.34	3.10
DEKALB	24.49	5.58	0.25	1.44	3.25
FENTRESS	9.08	1.65	0.09	0.55	0.62
JACKSON	1.72	0.28	0.01	0.11	0.21
MACON	4.55	0.79	0.05	0.28	0.24
OVERTON	5.42	0.89	0.04	0.35	0.34
PICKETT	5.43	1.35	0.06	0.32	0.80
PUTNAM	67.97	12.66	0.77	4.24	1.40
SMITH	7.18	1.08	0.05	0.46	0.32
VAN BUREN	6.84	1.79	0.07	0.39	0.73
WARREN	19.12	3.45	0.18	1.19	0.77
WHITE	11.77	1.50	0.07	0.79	0.56
Total	\$244.86	\$50.90	2.68	\$14.95	\$13.01
SOUTHEAST TENNESSEE REGION					
BLEDSON	\$2.68	\$0.45	0.02	\$0.16	\$0.43
BRADLEY	82.17	15.73	0.97	5.23	1.76
GRUNDY	5.62	0.78	0.02	0.36	1.01
HAMILTON	533.73	137.78	7.06	31.82	11.87
MCMINN	25.62	4.39	0.26	1.61	0.64
MARION	20.70	3.98	0.24	1.27	0.76
MEIGS	5.70	1.15	0.04	0.33	0.75
POLK	16.49	4.52	0.20	0.96	1.54
RHEA	22.35	4.55	0.24	1.36	1.51
SEQUATCHIE	4.61	0.79	0.03	0.28	0.34
Total	\$719.68	\$174.13	9.07	\$43.38	\$20.61

Table I: Alphabetical by Region, 2002

2003 Impact of U.S. Resident Travel on Tennessee
Table I: Alphabetical by Region, 2002 (Continued)

	Expenditures (<u>\$ Millions</u>)	Payroll (<u>\$ Millions</u>)	Employment (<u>Thousands</u>)	State Tax Receipts (<u>\$ Millions</u>)	Local Tax Receipts (<u>\$ Millions</u>)
MID-CUMBERLAND REGION					
CHEATHAM	\$12.60	\$2.56	0.13	\$0.75	\$0.43
DAVIDSON	3,008.06	1,499.22	56.80	151.48	77.52
DICKSON	36.25	7.33	0.47	2.24	0.90
HOUSTON	4.13	0.75	0.04	0.24	0.45
HUMPHREYS	22.51	4.89	0.26	1.24	1.50
MONTGOMERY	104.67	20.39	1.18	6.81	2.02
ROBERTSON	22.85	3.77	0.20	1.54	0.62
RUTHERFORD	151.33	28.88	1.72	9.58	3.27
STEWART	5.19	0.80	0.03	0.32	0.78
SUMNER	65.88	12.67	0.73	4.19	1.52
TROUSDALE	2.45	0.32	0.02	0.15	0.08
WILLIAMSON	165.74	32.31	1.87	10.24	3.43
WILSON	69.44	14.47	0.79	4.31	2.08
Total	\$3,671.10	\$1,628.36	64.25	\$193.10	\$94.60
SOUTH CENTRAL TENNESSEE REGION					
BEDFORD	\$19.78	\$3.99	0.21	\$1.21	\$0.78
COFFEE	46.03	9.44	0.56	2.83	1.22
FRANKLIN	13.67	2.38	0.12	0.88	0.65
GILES	15.20	2.56	0.14	0.98	0.66
HICKMAN	5.34	0.91	0.04	0.32	0.52
LAWRENCE	25.35	4.36	0.22	1.65	0.70
LEWIS	4.15	0.76	0.05	0.25	0.20
LINCOLN	14.00	2.30	0.13	0.92	0.45
MARSHALL	16.68	3.29	0.17	1.07	0.45
MAURY	68.14	11.25	0.64	4.31	1.44
MOORE	1.05	0.18	0.01	0.06	0.06
PERRY	4.74	0.77	0.02	0.26	1.25
WAYNE	7.83	1.57	0.08	0.47	0.50
Total	\$241.95	\$43.77	2.38	\$15.22	\$8.88

Table I: Alphabetical by Region, 2002

2003 Impact of U.S. Resident Travel on Tennessee**Table I: Alphabetical by Region, 2002 (Continued)**

	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
NORTHWEST TENNESSEE REGION					
BENTON	\$16.28	\$3.05	0.15	\$1.04	\$1.75
CARROLL	12.03	1.93	0.11	0.75	0.46
CROCKETT	5.56	1.03	0.06	0.33	0.25
DYER	27.07	5.29	0.32	1.73	0.64
GIBSON	22.75	3.14	0.17	1.54	0.69
HENRY	37.43	7.28	0.31	2.25	4.83
LAKE	8.42	2.05	0.13	0.49	0.64
OBION	32.71	6.38	0.35	2.03	1.00
WEAKLEY	12.27	2.03	0.11	0.77	0.42
Total	\$174.52	\$32.17	1.71	\$10.94	\$10.67
SOUTHWEST TENNESSEE REGION					
CHESTER	\$5.61	\$0.67	0.03	\$0.39	\$0.18
DECATUR	7.81	1.21	0.04	0.49	1.40
HARDEMAN	16.31	2.69	0.14	1.03	0.94
HARDIN	24.69	4.74	0.20	1.55	2.13
HAYWOOD	10.23	1.69	0.09	0.66	0.46
HENDERSON	15.19	2.51	0.14	0.98	0.49
MCNAIRY	7.04	1.16	0.05	0.43	0.40
MADISON	121.51	26.69	1.62	7.45	2.64
Total	\$208.39	\$41.35	2.32	\$12.98	\$8.63
MEMPHIS DELTA REGION					
FAYETTE	\$4.83	\$0.70	0.03	\$0.30	\$0.27
LAUDERDALE	11.84	1.81	0.09	0.72	0.96
SHELBY	2,327.80	1,732.82	50.36	105.21	65.84
TIPTON	17.23	2.72	0.14	1.13	0.56
Total	\$2,361.70	\$1,738.04	50.62	\$107.36	\$67.63

Table I: Alphabetical by Region, 2002

STATE TOTALS	\$10,297.98	\$4,471.96	171.19	\$552.25	\$308.86
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C2004 TIA

Table J: Region Total, 2003

2003 Impact of U.S. Resident Travel on Tennessee					
Table J: Region Total, 2003					
<u>Region</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
NORTHEAST	\$470.72	\$118.79	5.59	\$28.21	\$14.73
EAST	2,296.90	674.79	33.36	130.97	73.20
UPPER CUMBERLAND	257.22	53.66	2.78	15.66	13.79
SOUTHEAST	758.53	184.28	9.45	45.59	21.71
MID-CUMBERLAND	3,746.21	1,660.18	64.55	196.84	96.85
SOUTH CENTRAL	251.85	45.81	2.45	15.80	9.22
NORTHWEST	179.06	33.04	1.73	11.21	10.90
SOUTHWEST	214.14	42.67	2.35	13.30	8.89
<u>MEMPHIS DELTA</u>	<u>2,405.16</u>	<u>1,777.66</u>	<u>50.92</u>	<u>109.03</u>	<u>69.18</u>
STATE TOTALS	\$10,579.80	\$4,590.88	173.19	\$566.62	\$318.48

C2004 TIA

Table K: Region Total, 2002

2003 Impact of U.S. Resident Travel on Tennessee					
Table K: Region Total, 2002					
<u>Region</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$</u> <u>Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$</u> <u>Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$</u> <u>Millions)</u>
NORTHEAST	\$448.54	\$112.91	5.40	\$26.95	\$14.05
EAST	2,227.23	650.32	32.77	127.36	70.80
UPPER CUMBERLAND	244.86	50.90	2.68	14.95	13.01
SOUTHEAST	719.68	174.13	9.07	43.38	20.61
MID-CUMBERLAND	3,671.10	1,628.36	64.25	193.10	94.60
SOUTH CENTRAL	241.95	43.77	2.38	15.22	8.88
NORTHWEST	174.52	32.17	1.71	10.94	10.67
SOUTHWEST	208.39	41.35	2.32	12.98	8.63
<u>MEMPHIS DELTA</u>	<u>2,361.70</u>	<u>1,738.04</u>	<u>50.62</u>	<u>107.36</u>	<u>67.63</u>
STATE TOTALS	10,297.98	4,471.96	171.19	552.25	308.86

C2004 TIA

Table L: Percent Change Over 2002 by Region Total

2003 Impact of Travel on Tennessee					
Table L: Percent Change Over 2002 by Region Total					
<u>Region</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
NORTHEAST	4.9%	5.2%	3.7%	4.7%	4.8%
EAST	3.1%	3.8%	1.8%	2.8%	3.4%
UPPER CUMBERLAND	5.0%	5.4%	3.7%	4.8%	6.0%
SOUTHEAST	5.4%	5.8%	4.1%	5.1%	5.3%
MID-CUMBERLAND	2.0%	2.0%	0.5%	1.9%	2.4%
SOUTH CENTRAL	4.1%	4.7%	3.1%	3.8%	3.9%
NORTHWEST	2.6%	2.7%	1.1%	2.4%	2.2%
SOUTHWEST	2.8%	3.2%	1.5%	2.5%	3.1%
<u>MEMPHIS DELTA</u>	<u>1.8%</u>	<u>2.3%</u>	<u>0.6%</u>	<u>1.6%</u>	<u>2.3%</u>
STATE TOTALS	2.7%	2.7%	1.2%	2.6%	3.1%

C2004 TIA

APPENDICES

Appendix A: Revised TravelScope® Data

U.S. Resident Travel Volumes, 1994-2003 (Millions)				
<u>Year</u>	<u>Person-Trips</u>	<u>Leisure</u>	<u>Business/ Convention</u>	<u>Combined Business/Leisure</u>
1994	1,038.7	800.9	162.8	75.0
1995	1,065.6	820.0	167.1	78.5
1996	1,067.4	828.8	162.8	75.8
1997	1,101.8	862.8	160.7	78.3
1998	1,108.0	862.6	165.5	79.9
1999	1,089.5	848.6	164.3	76.6
2000	1,100.8	865.7	161.5	73.6
2001	1,123.1	895.5	153.1	74.5
2002	1,127.0	912.3	142.4	72.3
2003	1,140.0	929.5	138.2	72.3

Travelers To And Through Tennessee, 1997-2003 (Thousands) *			
<u>Year</u>	<u>Total</u>	<u>Overnight</u>	<u>Day Trip</u>
1997	43,083	25,339	17,744
1998	41,273	24,704	16,569
1999	40,612	24,684	15,928
2000	38,504	22,754	15,749
2001	41,027	25,023	16,005
2002	42,041	25,115	16,926
2003	42,754	25,814	16,939

Source: TIA

* Reflects person trips.

Appendix B: Travel Economic Impact Model

INTRODUCTION

The Travel Economic Impact Model (TEIM) was developed by the research department at TIA (formerly known as the U.S. Travel Data Center) to provide annual estimates of the impact of the travel activity of U.S. residents on national, state and county economies in this country. It is a disaggregated model comprised of 16 travel categories. The TEIM estimates travel expenditures and the resulting business receipts, employment, personal income, and tax receipts generated by these expenditures.

The TEIM has the capability of estimating the economic impact of various types of travel, such as business and vacation, by transport mode and type of accommodations used, and other trip and traveler characteristics.

The revised TEIM has been used to develop estimates of 1987 and subsequent year travel expenditures and the effect of these expenditures on employment, payroll, and tax revenue in each of the 50 states and the District of Columbia. TIA has also produced a time series of estimates for the years 1977-87 through the revised TEIM. The County Impact Component of the TEIM allows estimates of the economic impact of travel at the county and city level.

DEFINITION OF TERMS

There is no commonly accepted definition of travel in use at this time. For the purposes of the estimates herein, *travel* is defined as activities associated with all overnight trips away from home in paid accommodations and day trips to places 50 miles or more, one way, from the traveler's origin. The TEIM definition includes all overnight trips regardless of distance away from home, but excludes day trips to places less than 50 miles away from home.

The word *tourism* is avoided in this report because of its vague meaning. Some define tourism as all travel away from home while others use the dictionary definition that limits tourism to personal or pleasure travel.

The *travel industry*, as used herein, refers to the collection of 16 types of businesses that provide goods and services to the traveler or potential traveler at the retail level (see Appendix C: Glossary of Terms). With the exception of Amtrak and second home ownership and rental, these business types are defined by the Office of Management and Budget in the 1997 North American Industry Classification System (NAICS) and well as in its predecessor, the 1987 Standard Industrial Classification System (SIC). In each case, the relevant NAICS and SIC codes are included.

A *travel expenditure* is assumed to take place whenever a traveler exchanges money for an activity considered part of his/her trip. Total travel expenditures are separated into 16 categories representing traveler purchases of goods and services at the retail level. One category, travel agents, receives no travel expenditures as these purchases are allocated to the category (i.e. air

transportation) actually providing the final good or service to the traveler. Travel expenditures are allocated among states by simulating where the exchange of money for goods or service actually took place. By their nature, some travel expenditures are assumed to occur at the traveler's origin, some at his/her destination, and some enroute.

Economic impact is represented by measures of spending, employment, payroll, business receipts, and tax revenues generated by traveler spending. *Payroll* includes all forms of compensation, such as salaries, wages, commissions, bonuses, vacation allowances, sick leave pay and the value of payments in kind paid during the year to all employees. Payroll is reported before deductions for social security, income tax insurance, union dues, etc. This definition follows that used by the U.S. Census Bureau in the quinquennial Census of Service Industries.

Employment represents the number of jobs generated by traveler spending, both full and part-time. As such, it is consistent with the U.S. Department of Labor series on nonagricultural payroll employment. *Tax revenues* include corporate income, individual income, sales, and gross receipts, and excise taxes by level of government. *Business receipts* reflect travel expenditures less the sales and excise taxes imposed on those expenditures.

DESCRIPTION OF THE MODEL

The basic data on travel activity levels (e.g., number of miles traveled by mode of transportation, the number of nights spent away from home spent by type of accommodation) are available from TIA's Travel Surveys and Smith Travel Research's Hotel and Motel Survey. Generally, the TEIM combines the activity levels for trips to places within the United States with the appropriate average costs of each unit of travel activity, (e.g., cost per mile by mode of transport, cost per night by type of accommodation), to produce estimates of the total amount spent on each of 16 categories of travel-related goods and services by state. For example, the number of nights spent by travel parties in campgrounds in Tennessee is multiplied by the average cost per night per travel party of staying in a campground facility in Tennessee to obtain the estimate of traveler expenditures for camping accommodations.

The Economic Impact Component of the TEIM estimates travel generated business receipts, employment, and payroll. Basically, the 16 travel categories are associated with a type of travel-related business. For example, traveler spending on commercial lodging in a state is related to the business receipts, employment and payroll of hotels, motels and motor hotels (SIC 701; NAICS 7211) in the state. It is assumed that travel spending in each category, less sales and excise taxes, equals business receipts for the related business type as defined by the U.S. Census Bureau.

It is assumed that each job in a specific type of business in a state is supported by some amount of business receipts and that each dollar of wages and salaries is similarly supported by some dollar volume of business receipts. The ratios of employment to business receipts are computed for each industry in each state. These ratios are then multiplied by the total amount of business receipts generated by traveler spending in a particular type of business to obtain the measures of travel generated employment and payroll of each type of business in each state. For example, the ratio of employees to business receipts in Tennessee commercial lodging establishments is

multiplied by travel generated business receipts of these establishments to obtain traveler-generated employment in commercial lodging. A similar process is used for the payroll estimates.

The Fiscal Impact Component of the TEIM is used to estimate traveler generated tax revenues of federal, state, and local governments. The yield of each type of tax is related to the best measure of the relevant tax base available for each state consistent with the output of the Economic Impact Component. The ratios of yield to base for each type of tax in each state is then applied to the appropriate primary level output to obtain estimates of tax receipts generated by travel. For example, the ratio of Tennessee state personal income tax collections to payroll in the state is applied to total travel generated payroll to obtain the estimate of state personal income tax receipts attributable to traveler spending in Tennessee.

The 1987 benchmark estimates of travel expenditures, and travel generated employment, payroll and federal, state and local tax revenue, are updated for each successive year. Data from the U.S. Bureau of the Census, Smith Travel Research, Enos Foundation, Runzheimer International, Cruise Lines International Association, Prentice-Hall, U.S. Department of Labor's Consumer Expenditure Survey and ES-202, American Society of Travel Agents, the Federal Aviation Administration, the Department of Transportation, Amtrak, the Federal Highway Administration, state revenue departments, TIA's Travel Survey and other sources are used for this purpose. These data indicate the change in travel spending for each of the expenditure categories for each state over the previous year, as well as changes in the relationship of travel spending to employment, payroll and tax revenue.

LIMITATIONS OF THE STUDY

This study is designed to indicate the impact of U.S. traveler expenditures on employment, payroll, business receipts, and tax revenue in each of the states. These impact estimates reflect the limitations inherent in the definition of travel expenditures. Two important classes of travel-related expenses have not been estimated due to various reasons. Consumers purchase certain goods and services in anticipation of a trip away from home. These include sports equipment (tennis racquet, skis, scuba gear, etc.), travel books and guides, and services such as language lessons and lessons for participatory sports (tennis, skiing, underwater diving, etc.). The magnitude of these purchases in preparation for a trip cannot be quantified due to lack of sound, relevant data.

The second type of spending not covered due to lack of sufficient data is the purchase of major consumer durables generally related to outdoor recreation on trips. Further research is required in this area to determine to what extent pre-trip spending on consumer durable products can justifiably be included within a travel economic impact study.

Appendix C: Glossary of Terms

Automobile Transportation Expenditures. This category includes a prorated share of the fixed costs of owning an automobile, truck, camper, or other recreational vehicle, such as insurance, license fees, tax, and depreciation costs. Also included are the variable costs of operating an automobile, truck, camper, or other recreational vehicle on a trip, such as gasoline, oil, tires, and repairs. The costs of renting an automobile or other motor vehicle are included in this category as well.

Entertainment/Recreation Expenditures. Traveler spending on recreation facility user fees, admissions at amusement parks and attractions, attendance at nightclubs, movies, legitimate shows, sports events, and other forms of entertainment and recreation while traveling.

Food Expenditures. Traveler spending in commercial eating facilities and grocery stores or carryouts, as well as on food purchased for off-premise consumption.

Incidental Purchase Expenditures. Traveler spending on retail trade purchases including gifts for others, medicine, cosmetics, clothing, personal services, souvenirs, and other items of this nature.

Lodging Expenditures. Traveler spending on hotels and motels, campgrounds and trailer parks, rental of vacation homes and other types of lodging.

Public Transportation Expenditures. This includes traveler spending on air, bus, rail and boat/ship transportation, and taxicab or limousine service between airports and central cities. Also included are expenditures on "other transportation" as indicated in the National Travel Survey.

Tourism. Generally avoided in this study, this can be used to refer to pleasure or personal travel, a subset of travel.

Travel. The act of taking a "trip".

Traveler. Person taking a "trip".

Travel Expenditure. The exchange of money or the promise of money for goods or services while traveling, including any advance purchase of public transportation tickets, lodging or other items normally considered incidental to travel, but which may be purchased in advance of the trip. In addition, certain of the "fixed" or capital costs of owning a motor vehicle (including campers, motor homes, etc.) or a vacation or second home are included as associated with taking a trip.

Generally, expenditures are assumed to take place at the point where the good or service is bought while traveling. The two exceptions to this rule are that the fixed costs of operating a motor vehicle while on a trip are allocated to the traveler's area of residence, and the "imputed rent" of spending nights in the traveler's own vacation home is allocated to the area visited.

Travel-generated Employment. The number of jobs attributable to travel expenditures in an area.

These estimates of employment follow the "establishment payroll survey definition" rather than the "household survey definition." Consequently, the TEIM estimates are more closely related to the number of jobs than to the number of employees. For a detailed description of the household and establishment survey differences, please refer to <http://www.bls.gov/lau/lauhvse.htm>.

Travel-generated Payroll. This is the payroll, or wage and salary income, attributable to travel expenditures in an area. Payroll includes all forms of compensation, such as salaries, wages, commissions, bonuses, vacation allowances, sick leave pay, and the value of payments in kind (such as free meals and lodging) paid during the year to all employees. Tips and gratuities received by employees from patrons and reported to employers are included. For corporations, it includes amounts paid to officers and executives; for unincorporated businesses, it does not include profit or other compensation of proprietors or partners. Payroll is reported before deductions for social security, income tax, insurance, union dues, etc.

Travel-generated Tax Receipts. Those federal, state and local tax revenues attributable to travel in an area. For a given state locality, all or some of the taxes may apply. "Local" includes county, city or municipality, and township units of government actually collecting the receipts and not the level that may end up receiving it through intergovernmental transfers.

Federal. These receipts include corporate income taxes, individual income taxes, employment taxes, gasoline excise taxes, and airline ticket taxes.

State. These receipts include corporate income taxes, individual income taxes, sales and gross receipts taxes, and excise taxes.

Local. These include county and city receipts from individual and corporate income taxes, sales, excise and gross receipts taxes, and property taxes.

Travel-generated Wage and Salary Income. The same as "travel-generated payroll."

Trip. A trip occurs, for the purpose of the model, every time one or more persons goes to a place 50 miles or more, each way, from home in one day, or is out of town one or more nights in paid accommodations, and returns to his/her origin. Specifically excluded from this definition are: (1) travel as part of an operating crew on a train, plane, bus, truck or ship; (2) commuting to a place of work; (3) student trips to school or those taken while in school.

Appendix D: Travel-Related Industry Measurement

SIC-NAICS TRANSITION

As described in Appendix A, the 16 types of travel categories used in TEIM are associated with types of travel-related businesses. For many years, TIA selected these business types using 1987 U.S. Standard Industrial Classification (SIC) system codes.

The SIC system has been used for decades with tremendous success to classify all businesses in the U.S. by the types of products or services they make available. To its credit, the SIC system has facilitated the collection, tabulation and analysis of data. It has also promoted “apples-to-apples” comparability in statistical analyses. At the industry group level, SIC Codes report industry groups as 2- or 3-digit categories to 4 digits at their most specific.

However, as a direct consequence of rapid and widespread structural changes throughout the American economy in recent years, the SIC system has become largely outdated. Therefore, its business classification capabilities have become increasingly less than optimal.

In 1998, the United States Office of Management and Budget published a new industry classification system – the 1997 (and 2002 update) North American Industry Classification System (NAICS) to replace the SIC system. In contrast, the 2- to 6-digit NAICS industry classification system includes more useful and detailed economic data and provides a more comprehensive statistical representation of our industry. NAICS offers four major advantages over the SIC system:

Relevance: NAICS identifies hundreds of new, emerging, and advanced technology industries. Perhaps most important in terms of quantification of travel-related activity, NAICS reorganizes industries into more meaningful sectors, especially in the service-producing segments of the economy. A few examples of travel-related industries that are separately recognized for the first time:

- Convenience stores
- Gas stations with convenience stores
- Casino hotels
- Casinos
- Other gambling industries
- Bed and breakfast inns
- Limited service restaurants

International Comparability: NAICS was developed by the U.S. Office of Management and Budget (OMB) in cooperation with Statistics Canada and Mexico’s Instituto Nacional de Estadística, Geografía e Informática (INEGI). NAICS provides for comparable statistics among the three NAFTA trading partners.

Consistency: NAICS defines industries according to a consistent principle -- businesses that use similar processes are grouped together.

Adaptability: NAICS will be reviewed *every five years*, so classifications and information keep up with our changing economy.

TEIM: SIC/NAICS INDUSTRY CATEGORIES

With the transition to NAICS, TIA has adjusted its selections of the travel-related business types using the new NAICS codes and brought its travel economic research into conformity with NAICS. For measurement purposes, TIA's Travel Economic Impact Model tracks business activity in seven (7) major travel-related industry groups. These, in turn, are comprised of sixteen (16) business subcategories.

The industry groups and subcategories used in the model are outlined below, followed by a detailed table of SIC and NAICS Codes.

1. Automobile Transportation Industry: Gasoline service stations, motor vehicle/parts dealers and passenger car rental.
2. Entertainment/Recreation Industry: Entertainment, art, and recreation industry.
3. Foodservice Industry: Eating & drinking places, and grocery stores.
4. General Retail Trade Industry: General merchandise group stores and miscellaneous retail stores, including gift and souvenir shops.

Incidental Purchases Industry: See above, *General Retail Trade Industry*.

5. Lodging Industry: This industry includes hotels, motels, and motor hotels, camps and trailer parks.
6. Public Transportation Industry: Air transportation, taxicab companies, interurban & rural bus transportation, railroad passenger transportation (Amtrak) and water passenger transportation. Also is the "dummy" industry of "other transportation."
7. Travel Arrangement Industry: This includes travel agencies, tour operators, and other travel arrangement & reservation services.

1987 SIC – 1997 NAICS:

Selected Travel-Related Categories

SIC DESCRIPTION(S)	SIC CODE(S)	NAICS DESCRIPTION(S)	NAICS CODE(S)
Accommodations			
Hotels and Motels	701	Traveler Accommodation	7211
Recreational Vehicle Parks & Campsites	703	Recreational Vehicle Parks & Campgrounds	7212
Auto Transportation			
Passenger Car Rental	7514	Passenger Car Rental	532111
Gasoline Service Stations	554	Gasoline Stations with Convenience Stores; Other Gasoline Stations	447110; 447190
Automotive Dealers	55 (excl. 554)	Motor Vehicle & Parts Dealers	4411; 4412; 4413
Entertainment and Recreation			
Amusement and Recreational Services	79	Amusement, Gambling & Recreation Industries	713
Museums, Art Galleries, Botanical and Zoological Gardens	84	Performing Arts, Spectator Sports & Related Industries Museums, Historical Sites & Similar Institutions	711 712
Food			
Eating & Drinking Places (Alcoholic Beverages)	581	Foodservices & Drinking Places	7221; 7222; 7224
Grocery Stores	541	Food and Beverage stores	4451; 4452; 4453
Public Transportation			
Air Transportation	45	Passenger Air Transportation; Airport Support Activities	481; 4881
Rail - Local & Suburban Transit	4111	Rail Transportation	485112
Interurban & Rural Bus Carriers	413	Interurban & Rural Bus Transportation	4852
Charter Bus/Interstate	4142	Charter Bus (interstate/interurban)	4855102
Taxi & Limousine Services	412	Taxi & Limousine Services	4853
Water Transportation of Passengers	448	Water Passenger Transportation	483112; 483114; 483212
--	--	Scenic & Sightseeing Transportation (New industry--includes parts of SICs 4119, 4489, 4522, 4789, 7999)	487
Retail			
General Merchandise Stores	53	General Merchandise Stores	452
Miscellaneous Retail Stores	59	Other Retail Stores	453; 44611; 4483; 4511; 4512; 45121
Travel Arrangement			
Travel Arrangement	472	Travel Arrangement & Reservation Services (includes travel agencies and tour operators)	5615

Appendix E: Sources of Data

This appendix presents major sources of data used in this report.

Organizations

Air Transport Association
American Automobile Association
Amtrak
American Society of Travel Agents
Bureau of Census, U.S. Department of Commerce
Bureau of Economic Analysis, U.S. Department of Commerce
Bureau of Labor Statistics, U.S. Department of Labor
Federal Aviation Administration, U.S. Department of Transportation
Federal Highway Administration, U.S. Department of Transportation
National Park Service
Tennessee Department of Tourist Development
Tennessee Department of Labor & Workforce Development
Tennessee Department of Revenue
Peterson, Howell & Heather, Inc.
Runzheimer International Ltd.
Smith Travel Research
Office of Travel and Tourism Industries (OTTI)/ITA, U.S. Department of Commerce

Appendix F: RIMS II

REGIONAL INPUT-OUTPUT MODELING SYSTEM

A BRIEF DESCRIPTION

Regional Economic Analysis Division
Bureau of Economic Analysis
U.S. Department of Commerce
Washington, D.C. 20230
(202) 523-0594

RIMS II

Many types of public sector and private sector decisions require an evaluation of probable regional effects. For example, Federal requirements for environmental impact statements and the urban impact of Federal policies necessitate regional impact analyses. A growing concern, therefore, about the effects of public and private decisions has created a demand for regional economic models.

As a result of this demand, economic impact models have been developed for many States and regions. These models vary considerably in terms of structure, reliability, sectoral and geographical detail, flexibility in application, and cost of development and use. In general, the models that provide the most reliable and industrially-detailed secondary impact estimates are the most expensive to construct, while the less costly models that can be used in numerous small-area studies often provide less accurate estimates.

In response to the growing need for improved techniques for regional impact analysis, the Regional Economic Analysis Division of the Bureau of Economic Analysis (BEA) developed the Regional Industrial Multiplier System (RIMS) in the mid-1970's. RIMS was designed to estimate input-output type multipliers for use in estimating the secondary regional impacts of public and private economic development policies. RIMS was capable of estimating multipliers for any region composed of one or more contiguous counties and for any of the 478 industrial sectors in the 1967 BEA national input-output (I-O) table. A significant improvement over the more summary measures often used in regional impact analysis, RIMS was capable of providing reliable multiplier estimates without the high cost of gathering survey data.

The Regional Input-Output Modeling System (RIMS II) is a major revision of RIMS. The basic differences between RIMS II and RIMS are the use of more recent national I-O tables (1972 and 1977), the use of more detailed and more current data for regionalizing the national I-O tables, and greater flexibility in the derivation of regional impact estimates through the use of a matrix inversion technique that provides industrially-disaggregated impacts. RIMS II developmental research is focused currently on estimating regional transactions tables, and comparing RIMS II estimates of state-specific imports and exports with survey-based estimates from the Census Bureau's Commodity Transportation Survey. RIMS II is also being adapted to analyze the regional and industrial impacts of defense procurement.

RIMS II METHODOLOGY

In order to estimate impacts such as those presented above, RIMS II uses the BEA national I-O tables which show the input and output structure of 500 industries. Since firms in all national industries are not found in each region, some direct requirements that are not produced in a study region are identified, using Bureau of Economic Analysis (BEA) 4-digit Standard Industrial Classification (SIC) county earnings data. The earnings data are used as proxies for the industry-specific input and output data which are seldom available at the small-area level. Using the same earning data, the resulting regional I-O table then can be aggregated to the level of industrial detail appropriate for the impact study.

More specifically, the RIMS II approach can be viewed as three-step process. In the first step, the national I-O matrix is made region-specific by using corresponding 4-digit SIC location quotients (LQ's). The LQ's are used to estimate the extent to which requirements are supplied by firms within the region. For this purpose, RIMS II employs LQ's based on two types of data. According to this mixed-LQ approach, BEA county personal income data, by place of residence, are used for the calculation of LQ's in the service sectors, while BEA earnings data, by place of work, are used for the LQ's in the nonservice sectors.

The second step involves estimations of the household row and the household column of the matrix. The household-row coefficients are estimated based on value-added gross-output ratios from the national I-O table and introduced into each industry's coefficient column. A household column is constructed, based on national consumption and savings rate data and national and regional tax rate data.

The last step in the RIMS II estimating procedure is to calculate the multipliers. Since it is most often necessary to trace the impact of changes in final demand on numerous individual directly- and indirectly-affected industries, RIMS II applications employ the Leontief inversion approach for obtaining multipliers. This inversion process produces output and earnings multipliers for all additionally affected industries.

ACCURACY OF RIMS II

Empirical tests of the accuracy of RIMS II multipliers indicates that RIMS II yields estimates that are not substantially different from those generated by regional I-O models based on the costly gathering of survey data. For example, a comparison of 224 industry-specific multipliers from survey based tables for Massachusetts, Washington, and West Virginia indicate that the RIMS II average multipliers overestimate the average multipliers from the survey based tables by approximately 5 percent, and, for the majority of individual industry-specific multipliers is less than 10 percent. In addition, RIMS II and survey multipliers show a statistically-similar distribution of affected industries.

ADVANTAGES OF RIMS II

There are numerous advantages to RIMS II. First, it is possible to provide estimates of economic impact without building a complete survey I-O model for each region under study, since RIMS II produces multipliers that are derived from secondary data sources. Second, the RIMS II multipliers are derived from a limited number of secondary data sources, thus eliminating the costs associated with the compilation of data from a wide variety of these sources. Third, because of the disaggregated sectoring plan employed by RIMS II, analysis maybe performed at a detailed industrial level, thereby avoiding aggregation errors that often occur when different industries are combined. Fourth, the RIMS II multipliers are based on a consistent set of procedures across areas, thus making comparisons among areas more meaningful than would be the case if the results were obtained from incompatible impact models designed only for an individual area. Fifth, the multipliers can be updated to reflect the most recent local area

earning and personal income data. The industrial output and personal earnings impacts estimated by RIMS II can be crucial for estimating effects not directly specified by RIMS II itself. For example, the estimation of regional, fiscal, labor migration, and environmental effects often depends on the estimation of the regional output and earnings impact of the initial stimulus. Since many of these important effects are often best analyzed on a case-by-case basis, one of the major advantages of using RIMS II is that valuable research resources can be spent on the analysis of these effects, rather than on the construction of an impact model. Therefore, when using RIMS II, a cost-effective impact study might devote most of its research budget to specifying initial impacts in industry specific detail, and analyzing the implications for other important aspects of regional economic activity of the RIMS II estimates impacts.

APPLICATIONS OF RIMS II

RIMS II multipliers, like the original RIMS multipliers, can be used in various types of impact studies. For example, the U.S. Nuclear Regulatory Commission has used RIMS II multipliers in the environmental impact statements required for licensing nuclear electricity-generated facilities. The U.S. Department of Housing and Urban Development (HUD) has used RIMS multipliers to assess the effects of various types of urban redevelopment expenditures. Specifically, BEA was able to quantify probable regional impacts based on the size, type, and location of the numerous individuals and groups outside the Federal Government. These multipliers have been used in analyzing the regional economic impacts of various projects, such as the operation of a prototype coal gasification plant, the expansion of port facilities, the reclamation of strip-mined land, the adoption of alternative energy futures, and the construction of mass transit facilities.

In August 1982, Association for University Business and Economic Research (AUBER) published a paper, "RIMS II: Overview and Applications," which, in addition to presenting an annotated review of regional economic modeling approached, describes the results of several recent applications of RIMS II and indicates several on-going RIMS II-based research projects. The paper is contained in Readings in Business and Economic Research (Vol. 3), available from Professor William A. Strang, Secretary-Treasurer of AUBER, Office of Research Administration, Graduate School of Business, University of Wisconsin-Madison, 1155 Observatory Drive, Madison, Wisconsin 53707.

A paper, "Trade in Regional I-O Tables", presented at the 1984 annual meetings of the Southern Regional Science Association, describes ongoing research undertaken (1) to evaluate further the usefulness of the techniques underlying RIMS II, and (2) to extend the RIMS II model beyond the estimation of regional transactions tables, as well as the levels of industry-specific imports and exports by state. As discussed in the paper, the research to date has focused on comparisons of estimates from the Census Bureau's Commodity Transportation Survey with those from RIMS II-based models. The report is available for copying cost (\$10.00) from the Regional Economic

Analysis Division, BE-61, Bureau of Economic Analysis, U.S. Department of Commerce Washington, D.C. 20230.

RIMS II MULTIPLIERS

RIMS II multipliers are intended to show the total regional effects on industrial output and personal earnings for any county or group of counties in the United States and for any of the 500 industrial sectors in the 1972 and 1977 BEA national I-O tables. More specifically, RIMS II multipliers can be used to estimate changes in total regional output and earnings resulting from changes in regional final demand for the output of specific industries. Regional output in the I-O context is similar to sales and includes sales to industries in the region and to final demand. In RIMS II, final demand includes sales to government, other regions, and capital formation.

For example, based on RIMS II multipliers, \$1 million of new warehouse construction in the Denver-Boulder, Colorado MSA would increase personal earnings in the MSA by \$.7 million; the same expenditure in the Wilmington, North Carolina MSA would increase earnings there by \$.5 million. The difference between the earnings impacts in the two MSA's occurs because the Denver-Boulder economy locally provides more of the total input requirements for construction of warehouses than does the Wilmington economy. In general, multipliers are smaller in smaller regional economies. However, multipliers and estimated regional impacts also depend on which industry is initially affected. For example, if the initial \$1 million were spent on the maintenance and repair of streets in Wilmington, the earnings effect there would be \$.7 million, which is the same as the effect of a \$1 million expenditure for warehouse construction in the larger Denver-Boulder metropolitan area.

This overview briefly describes RIMS II multipliers, the multiplier-estimation procedures, and some of the advantages and uses of RIMS II. For additional information, see Regional Input-Output Modeling Systems (RIMS II), which is available from the U.S. Government Printing Office.

Appendix G:

Top 6 Nonagricultural Industries by Payroll and Employment in Tennessee in 2003

Based on total payroll income, travel and tourism was Tennessee's second largest industry, generating nearly \$4.7 billion in wages in 2003.

Travel and tourism was the state's largest employer, providing 177.1 thousand jobs for Tennessee residents in 2003.

Top 6 Industries by Nonfarm Payroll (Tennessee, 2003)

Rank	NAICS Code*	Industry Name	Total Wages (\$ Millions)
1	541	Professional and technical services	\$4,681.0
2		Travel & Tourism***	\$4,668.0
3	621	Ambulatory health care services	\$4,653.2
4	561	Administrative and support services**	\$3,619.1
5	622	Hospitals	\$3,143.7
6	423	Merchant wholesalers, durable goods	\$2,843.5

Top 6 Industries by Nonfarm Employment (Tennessee, 2003)

Rank	NAICS Code*	Industry Name	Total Employment (Thousands)
1		Travel & Tourism***	177.1
2	561	Administrative and support services**	156.6
3	722	Food services and drinking places**	119.5
4	541	Professional and technical services	97.9
5	621	Ambulatory health care services	97.7
6	622	Hospitals	85.4

Sources: TIA, U.S. Bureau of Labor Statistics.

Notes: * The 1997 North American Industry Classification System. NAICS 541 includes certain professional and business services (formerly SICs 73, 87). NAICS 561 includes business services NEC (formerly SIC 7389).

** Excludes wages or jobs attributable to the travel and tourism industry.

*** Payroll and employment generated by both domestic and international travel spending.